



FREE US PARENT TOOLKIT

IEP Meeting Preparation & Evaluation Request Toolkit

A practical workbook for organizing concerns, requesting an evaluation, preparing for an IEP meeting and tracking next steps.

Federal baseline

This toolkit summarizes federal IDEA procedures. States may add timelines, forms, eligibility rules and protections. Always check your state education agency and local district procedural safeguards notice.

Includes: evaluation request letter • records checklist • suspected-area planner • IEP meeting worksheets • PWN tracker • follow-up plan

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How to use this toolkit

Use only the pages that fit your situation. Print the PDF or type directly into the Word version.

- ☐ Start with the Child Snapshot and Concern Log.
- ☐ If you are requesting an initial IDEA evaluation, use the Evaluation Request Checklist and sample letter.
- ☐ Before an IEP meeting, complete the Meeting Priorities, Present Levels, Goals and Services review pages.
- ☐ After a meeting or decision, record what was agreed and save any Prior Written Notice (PWN).
- ☐ Keep copies of emails, forms, evaluations, IEPs and progress reports with this workbook.

Important

A medical diagnosis can be useful information, but IDEA eligibility is an educational legal determination. A parent may initiate a request for an initial evaluation under IDEA. The federal evaluation timeline is generally 60 days after parental consent unless the state establishes its own timeframe, subject to regulatory exceptions.

Your state information

State	
School district / LEA	
State education agency website	
Procedural safeguards link/date	
District special education contact	

Child snapshot

Student name / initials	
Date of birth / grade	
School	
Parent / caregiver	
Primary language(s)	
Current plan	☐ No plan ☐ IEP ☐ Section 504 ☐ Other

Strengths and interests

What is going well at school?

Top concerns right now

Concern and pattern log

Use specific examples: dates, settings, skills, work samples, missed instruction, behavior patterns or communication from school.

Date	What happened / concern	Impact on learning or access	Evidence / follow-up

Tip

Describe observable facts rather than labels. For example: “Needed 40 minutes and adult prompting to start a 10-minute written task” is more useful than “struggles with writing.”

Special education evaluation request checklist

- ☐ I have written down my concerns and examples.
- ☐ I have identified suspected areas that may need assessment.
- ☐ I have gathered relevant school records, work samples and outside reports I want the school to consider.
- ☐ I will make the request in writing and keep a dated copy.
- ☐ I will ask where to send the request and how the district handles consent.
- ☐ I will save the district's response, consent form and Prior Written Notice, if provided.
- ☐ I will check my state's evaluation timeline and procedural safeguards notice.

What I want the evaluation to help answer

Parent request for an initial special education evaluation

Adapt this sample to your child. Avoid copying concerns that do not apply.

Date: _____

To: _____ (school / district contact)

Re: Request for an initial evaluation for _____

Dear _____,

I am the parent/caregiver of _____, who is in grade ____ at _____. I am requesting a full and individual initial evaluation under the Individuals with Disabilities Education Act (IDEA) to determine whether my child is eligible for special education and related services and to identify educational needs.

My concerns include: _____

Examples showing these concerns include: _____

Please consider evaluating all suspected areas of disability and educational need, including:

Relevant information I would like the team to consider includes: _____

Please let me know the next steps, including any consent forms and the applicable evaluation timeline. Please provide written notice of the district's response as required by IDEA.

Thank you,

Name: _____ Contact: _____

Before sending

Check your state or district form requirements. The federal IDEA baseline allows a parent to initiate an initial evaluation request; state procedures may specify where or how to submit it.

Suspected areas and evaluation questions

- ☐ Academic achievement / reading / writing / math
- ☐ Speech and language / communication
- ☐ Attention / executive functioning
- ☐ Social-emotional or behavioral functioning
- ☐ Cognitive / learning processes
- ☐ Adaptive / daily living skills
- ☐ Motor / occupational therapy needs
- ☐ Physical therapy / mobility
- ☐ Hearing / audiology
- ☐ Vision
- ☐ Assistive technology
- ☐ Other area: _____

Questions I want the evaluation to answer

Records and evidence checklist

- ☐ Current and previous report cards
- ☐ Attendance records
- ☐ State / district assessment results
- ☐ Classroom work samples
- ☐ Intervention / MTSS / RTI data
- ☐ Discipline or behavior records, if relevant
- ☐ Teacher communications and meeting notes
- ☐ Existing IEP / 504 plan / service plans
- ☐ IEP progress reports
- ☐ Previous school evaluations
- ☐ Private evaluations or medical information I choose to share
- ☐ Therapy reports or recommendations, if relevant
- ☐ Student's own views and goals

Records requested / still missing

Record	Requested from	Date requested	Received

IEP meeting priorities

My three most important outcomes for this meeting

1.

2.

3.

What I want the team to understand about my child

Decisions I expect the team to discuss

- ☐ Eligibility / reevaluation
- ☐ Present levels
- ☐ Annual goals
- ☐ Special education services
- ☐ Related services
- ☐ Accommodations / supports
- ☐ Behavior supports
- ☐ Assistive technology
- ☐ Placement / LRE
- ☐ Transition planning
- ☐ Other: _____

Present levels review

Compare the draft or current IEP with recent evaluation data and real-world performance.

Area	Current baseline / data	What the IEP says	What needs clarification
Ask Do the present levels describe strengths, needs and how the disability affects involvement and progress in the general education curriculum or, for preschool children, participation in appropriate activities?			

Annual goal review

Goal / skill	Baseline	Target / criteria	How measured	Progress status

- ☐ Each goal connects to an identified disability-related need.
- ☐ The target is measurable enough to know whether progress occurred.
- ☐ The IEP states how progress will be measured.
- ☐ The IEP states when progress reports will be provided.

Services, related services and supports

Service / support	Provider / role	Frequency	Location	Duration / dates

Questions

- ☐ Is the wording specific enough for everyone to know what will be delivered?
- ☐ Are related services included when needed to help the student benefit from special education?
- ☐ Are supports for school personnel identified if needed?
- ☐ If behavior impedes learning, has the team considered positive behavioral interventions and supports?

Accommodations, supplementary aids and access

Need / barrier	Accommodation / aid / support	Where / when used	Who ensures it happens

Access check

- ☐ Classroom instruction
- ☐ Tests and assignments
- ☐ Nonacademic and extracurricular activities
- ☐ Communication access
- ☐ Technology access
- ☐ Transportation / arrival / dismissal
- ☐ Field trips and school events

Questions to bring to the IEP meeting

- ☐ What data show the student's current performance?
- ☐ What changed since the last IEP or evaluation?
- ☐ How were proposed goals selected?
- ☐ How will each goal be measured and reported?
- ☐ What services are being proposed, and why?
- ☐ What options did the team consider and reject?
- ☐ How will accommodations be communicated to all responsible staff?
- ☐ What related services are required for the student to benefit from special education?
- ☐ What positive behavior supports are needed, if behavior affects learning?
- ☐ What happens next, by when, and who is responsible?

My additional questions

IEP meeting notes and decisions

Meeting date	
Meeting type	
People present	
Student participated?	☐ Yes ☐ No ☐ Part of meeting

Key data or concerns discussed

Decisions / agreements

Items not resolved

Prior Written Notice (PWN) tracker

Use this when the district proposes or refuses an IDEA action involving identification, evaluation, placement or FAPE.

Date	Request / issue	Proposed or refused action	Reason / evidence stated	Follow-up

PWN content check

- ☐ Describes the action proposed or refused.
- ☐ Explains why the agency proposes or refuses the action.
- ☐ Identifies evaluations, assessments, records or reports used as a basis.
- ☐ Describes other options considered and why they were rejected.
- ☐ Describes other relevant factors.
- ☐ Explains procedural safeguards and where to get help.

After the meeting: follow-up action plan

Action / question	Who is responsible	Due / check-in date	Status

Documents I am waiting for

- ☐ Final / revised IEP
- ☐ Evaluation report
- ☐ Eligibility documentation
- ☐ Prior Written Notice
- ☐ Procedural safeguards notice
- ☐ Service schedule / provider information
- ☐ Progress monitoring data
- ☐ Other: _____

My next written follow-up

Federal IDEA checkpoints and official sources

Use current state information

State education agencies publish procedural safeguards, complaint procedures and state-specific timelines. Keep the current version for your state with this workbook.

Federal checkpoints used in this toolkit

Initial evaluation request

A parent or public agency may initiate a request for an initial evaluation. Federal regulations generally require completion within 60 days after parental consent unless the state has its own timeframe, subject to exceptions.

<https://sites.ed.gov/idea/regs/b/d/300.301>

Parent participation

Schools must take steps to ensure parents are present or have an opportunity to participate in IEP Team meetings.

<https://sites.ed.gov/idea/regs/b/d/300.322>

Prior Written Notice

Written notice is required a reasonable time before the agency proposes or refuses certain identification, evaluation, placement or FAPE actions.

<https://sites.ed.gov/idea/regs/b/e/300.503>

Procedural safeguards

The notice explains rights involving consent, records, IEEs, complaints, mediation, due process, discipline and other protections.

<https://sites.ed.gov/idea/regs/b/e/300.504>

IEP content

Federal rules specify required IEP content, including present levels, measurable annual goals, services and progress measurement.

<https://sites.ed.gov/idea/regs/b/d/300.320>

State and local contacts

State education agency	
Parent training / information center	
District special education office	
State complaint information	
Mediation / due process information	

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