

# The Paper Chase: Managing Your Child's Documents

by Robert K. Crabtree, Esq.

*If you've got kids with special educational needs, you can be overwhelmed by the paperwork in no time at all. From the beginning of school to the time your child either graduates or "ages out" of entitlement to special education services, the accumulation of IEP's, evaluations, progress reports, correspondence, notes, journals, samples of your child's work, and medical records, will fill several drawers of a file cabinet or take up most of your shelf space.*

*You might be tempted to throw out papers when they get out of hand, but this may be a mistake. Even the oldest documents in your child's history can sometimes help you make a case for increased or different services under IDEA. Make sure you understand the relative importance of different documents and organize them sensibly.*

## **Which Documents Are Keepers?**

*Here's a list of the different documents that you'll see over the course of your child's special needs education. You should keep them all!*

**1. Individualized Educational Programs (IEP's) and other official service plans.** *In addition to IEP's, you may have Individualized Family Service Plans (IFSP). These are service plans that govern early intervention programs for kids before they're old enough to receive special education services, or plans that are written by agencies other than the local school system (such as a department of mental health or mental retardation).*

**2. Evaluations by the school system and by independent evaluators.** *Depending on your child, these will include educational, psychological and/or neuropsychological, speech and language, occupational therapy, and physical therapy evaluations.*

**3. Medical records.** *You probably don't need to keep all medical records with your child's IDEA documents. Keep only those that relate to the disability or disabilities that affect his ability to learn or to access school programs and facilities. As with any other kind of document, when in doubt, keep it!*

**4. Progress reports and report cards.** *These are the formal documents where the school system periodically describes how your child is doing.*

**5. Standardized test results.** *School systems often administer standardized tests (such as the California Achievement Tests) to all students. These tests can provide a helpful comparison to the progress reports written by your child's teachers.*

**6. Notes on your child's behavior or progress.** *These will include notes from you to the teacher, from the teacher to you, or journal entries between you and your child's service providers. Sometimes notes from a concerned teacher tell a different story than the formal report the teacher develops at the request of her supervisor when the TEAM convenes.*

**7. Correspondence.** *Save any correspondence between you and teachers, special education administrators, TEAM chairpersons, and evaluators. Don't forget emails -- print them out and include them in your correspondence file. Also save correspondence from the school system that's addressed to you or to all special education parents describing issues that affect your child. This may include letters describing new programs, changes in programs or services, school system policies for children with special education needs, or budget issues.*

**8. Notes from conversations and meetings** *with school personnel, evaluators, the child's TEAM, or other interactions relating to your child's program or needs. Be certain to take excellent notes at key meetings or, better yet, bring someone with you whose only task is to take notes (especially at TEAM meetings). These notes can help enormously when, months later, you try to remember exactly what various people said or what agreements were reached.*

**9. Documents relating to discipline and/or behavioral concerns.** *These include notices of detention and suspension (both in and out of school), letters describing the concerns of service providers or school administrators about behavior, records of behavioral assessments, and records of behavioral plans for addressing behavioral issues.*

**10. Formal notices of meetings scheduled to discuss your child.** *When you get a notice like this, jot down the date you received it. Sometimes the question of whether a school system has met time requirements is important under IDEA. (It is sometimes a good idea to keep copies of the envelopes in which such notices arrive. Check the date of the notice or letter and the date of the postmark. It could be significant if the postmark is later than the date on the notice.)*

**11. Samples of schoolwork.** *You don't need to keep every scrap of writing or drawing that your child produces, but it can be helpful to keep examples each year. You can compare these to show how much progress he's made in different academic areas.*

**12. Invoices and cancelled checks.** *Save the ones from services that you provide for your child's educational development. For example, if you hire a speech and language pathologist for an hour of therapy each week to supplement the school system's services, keep a record of any payment. Eventually, you can seek reimbursement for this expense. (You must be able to prove that it was necessary because the school's services weren't allowing your child to progress effectively.)*