

Standardizing IEP Documentation: Benefits, Best Practices, and Winning Strategies

Meet Your Presenters



Stacy Hunt

Former Special Education
Teacher, Current Customer
Success Manager

Level Data



Evan Spellman

Product Director

Level Data

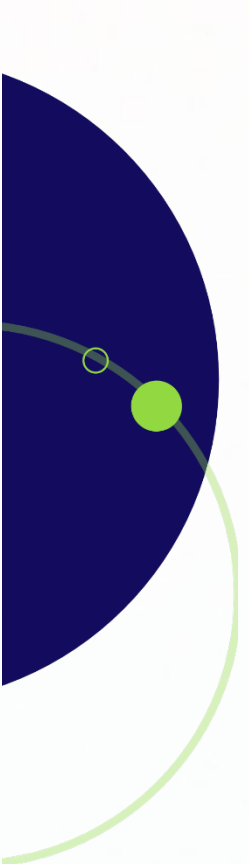
Objectives

- Understand how standardized documentation improves IEP quality, reduce errors, and compliance risks
- Reduce errors and compliance risks
- Support consistent implementation across classrooms
- Strategies to streamline documentation

Poll

What data does your special education team currently track?

- A. Services
- B. Progress
- C. Accommodations/Modifications
- D. All



Poll

Is your current method of tracking IEP data effective?

A. Yes

B. No

Why Documentation Matters

- IEP documentation is required
- Documentation provides educators data for stronger IEP writing
- Clear documentation allows for better collaboration among the IEP team

Common Documentation Challenges

- Inconsistent or incomplete tracking
- Tracking incorrect IEP data
- Siloed data with limited visibility
- Burden on educators to figure out how/what to document

Scenario

At Lincoln Elementary School, the special education team handles providing and tracking services for 24 students with IEPs.



Mr. Thompson

Resource Room Teacher

- Created his own **Excel spreadsheet** to track minutes
- Records services as "**completed**" without specifying duration or content
- **Occasionally, enters data a week after** services were provided



Ms. Rodriguez

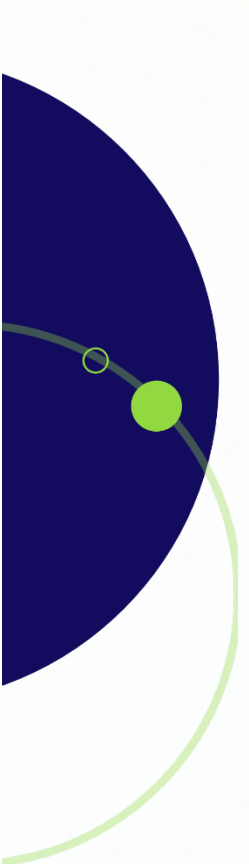
Special Education Teacher

- Uses a **paper calendar** where she jots down **student initials and session length**
- **Sometimes forgets to record when sessions are canceled or rescheduled**
- Keeps brief **handwritten notes** on student performance in a separate notebook

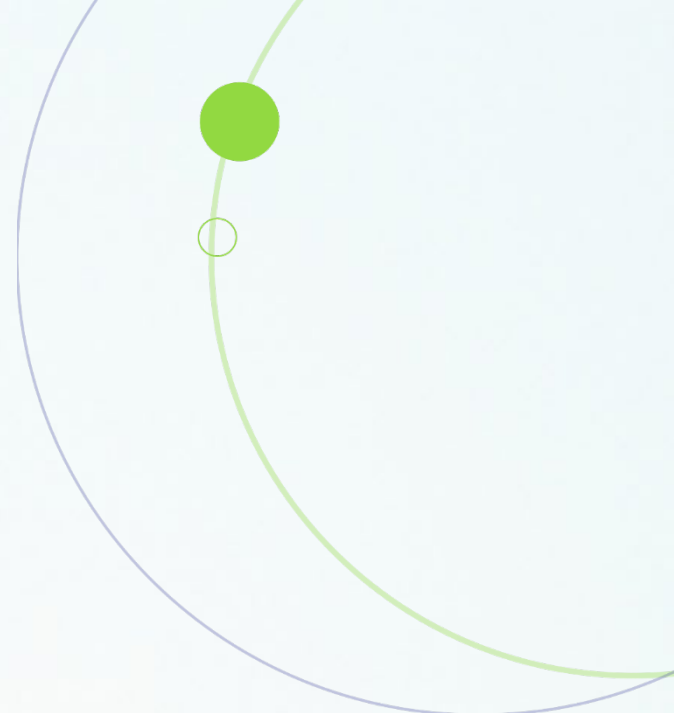


Impact of Inconsistent Documentation

- Difficult to know if the IEP is being implement correctly
- Increased compliance risks
- Possible gaps in service delivery
- Difficulty tracking progress across district



Standardizing Documentation...

- Reduces errors and missing data points
 - Enhances data insights
 - Increases team collaboration
 - Reduces educator burden with documentation
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What Standardization Looks Like

- Tracking clearly defined data points in the same format
- Using a standardized naming conventions and terminology
- Tracking data in a timely manner
- Writing clear, consistent notes

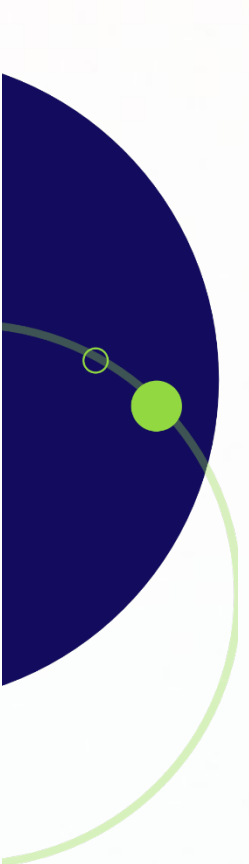
What Standardization Is Not

Standardization...

- does not standardize the supports, services, or goals being provided to students
- does not mean copy and paste data
- does not limit teacher expertise

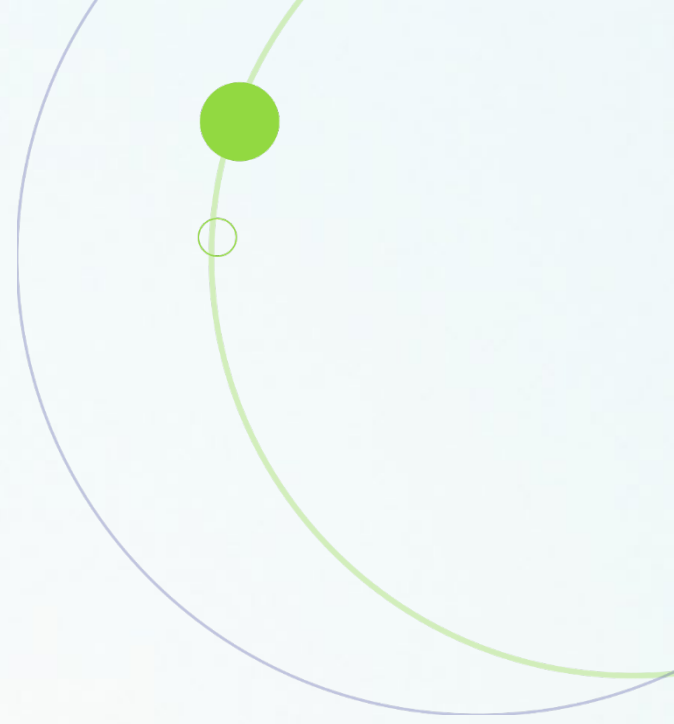
Getting Started

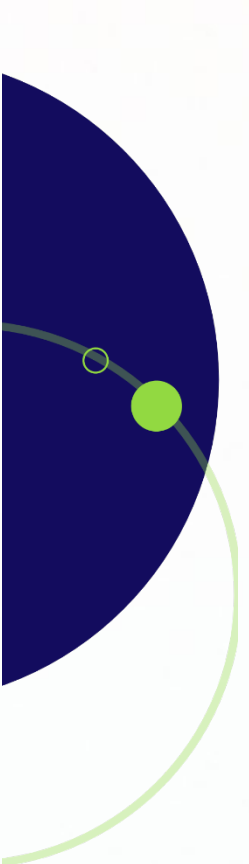
Clarity and Consistency



Clarity

Define answers to key questions...

- Who documents what?
 - What is being documented?
 - How is it being documented?
 - When to document?
- 



Consistency

Documentation...

- happens in the same place by all educators
- is completed within a set time
- is completed in the same format and addresses the same data points
- uses the same terminology

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Scenario

Start with...	Include...
Data Points	• Services • Goals • BIP • Supports (A/M)
Terminology	• Defined nomenclator that aligns with IEPs • District and/or state preferred language
Format	• Requires specific data points to be completed • Allows for transparency (if desired) • Easy to access and updates

Scenario

Service Tracking

Help

Evan Spellman
Brolly Demo

+ Logs

Draft

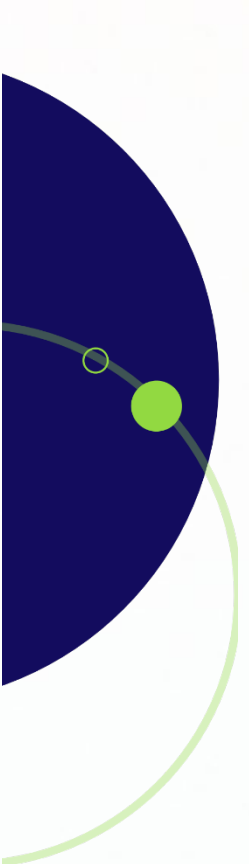
Select Draft

☐	Student	Date	Start/End Time	Service Area	Goals	Notes	Missed Service
Submitted (5)							
☐	Claire Ogden	Mar 13	8:00 am - 8:30 am (30 minutes)	Functional Skills	Work Completion	Problem-solving in daily scenari...	
☐	Audrey Fisher	Mar 13	10:30 am - 11:30 am (60 minutes)	Self Help Skills	Executive Functioning/T...	We worked on goal-setting prac...	
☐	Dylan Grant	Mar 13	8:00 am - 8:30 am (30 minutes)	Functional Skills	Work Completion	We worked on problem-solving ...	
☐	Ashton Blevins	Mar 13	8:30 am - 10:30 am (120 minutes)	Reading	2 goals	Text features exploration. The s...	
☐	Ashton Blevins	Mar 13	8:00 am - 8:30 am (30 minutes)	Functional Skills	Work Completion	Problem-solving in daily scenari...	

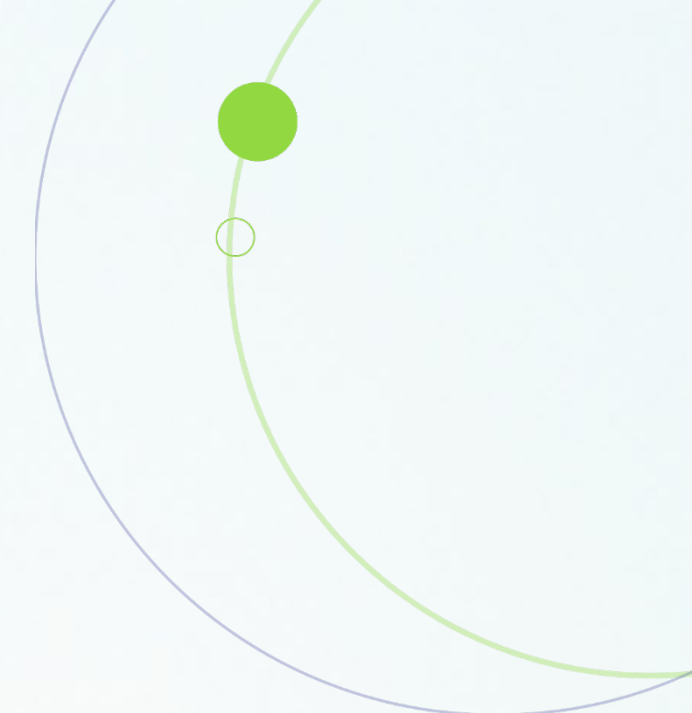
5 Submitted Logs

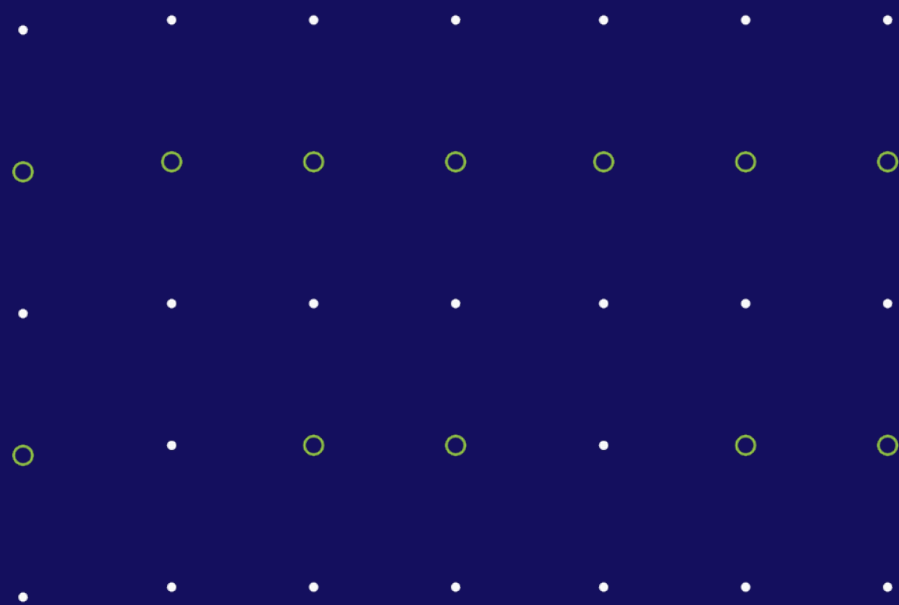
Draft saved 3 minutes ago

Submit All (5)

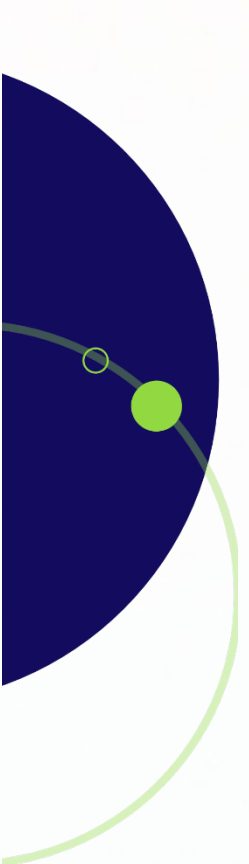


Power of Standardized Data

- Makes progress and services easier to track
 - Ensures educators understand the IEP data they are tracking
 - Supports evidence-based decisions
 - Allows for district wide analysis
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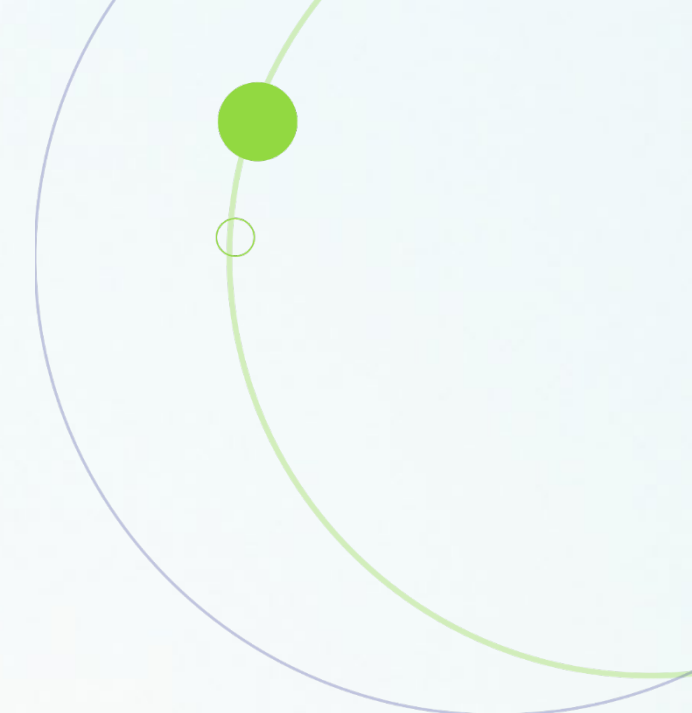


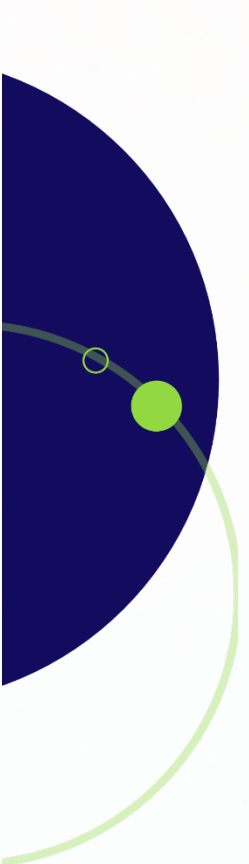
Insights



Poll

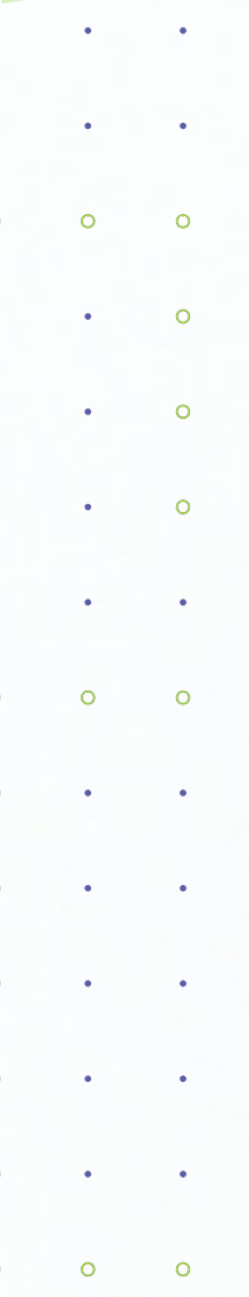
What insights can you gain when documentation is consistent?

- A. Service delivery patterns
 - B. Instructional effectiveness
 - C. Goal progress trends
 - D. Resource allocation needs
 - E. All of the above
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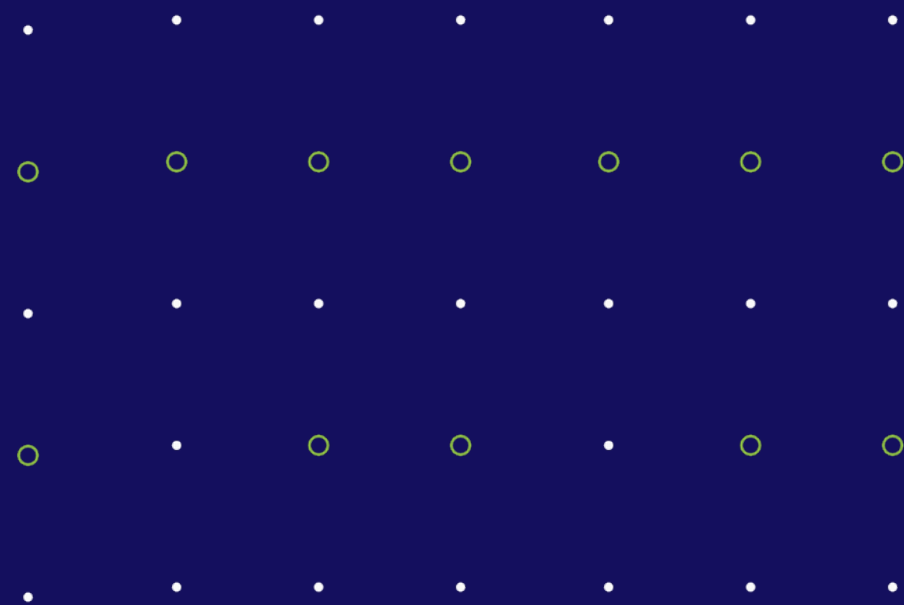


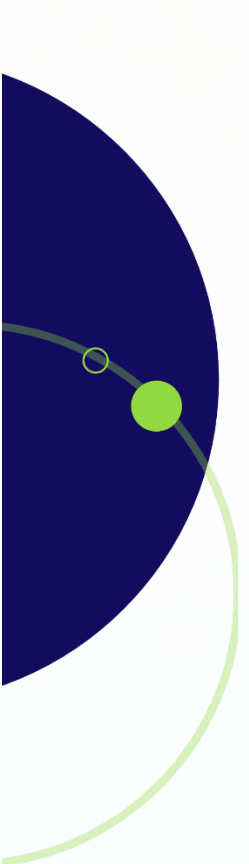
Insights

When documentation follows consistent formats, districts can analyze:

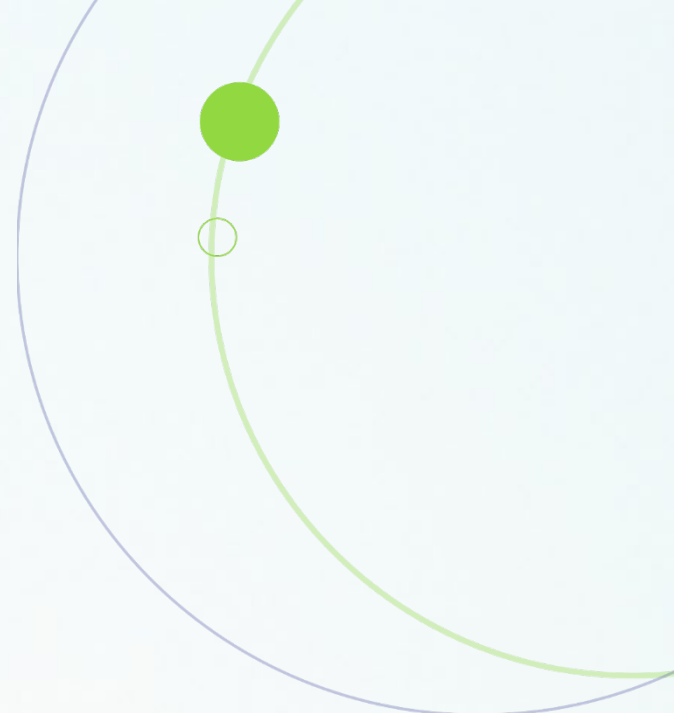
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- Service delivery patterns
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Strategies for Success



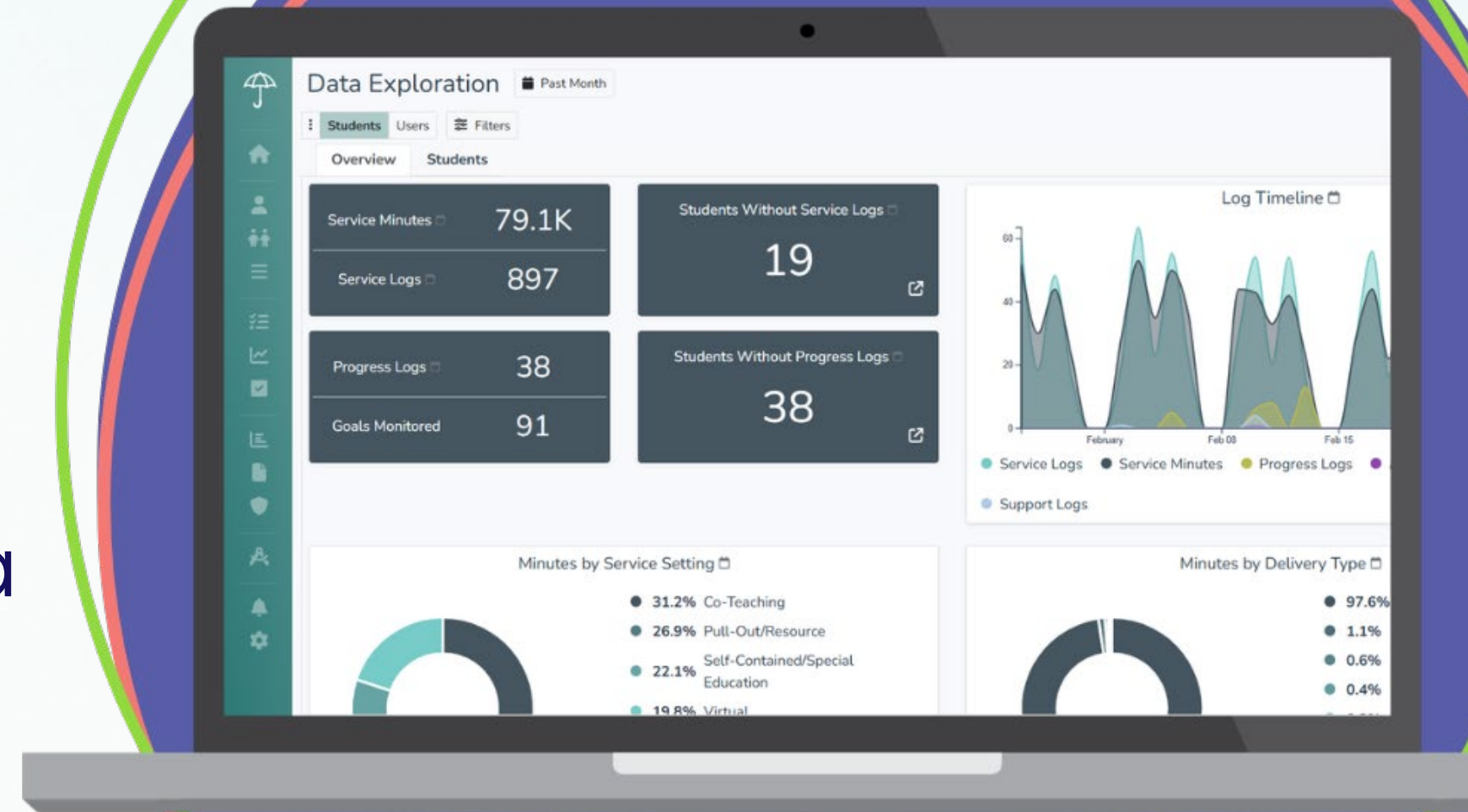


Standardization Roadmap

- Define documentation standards
 - Provide staff training
 - Introduce templates and tools
 - Monitor and refine practices
- 

What Does Brolly Offer?

- SDI documentation
- IEP goal progress tracking
- Student notes and centralized data
- Robust reporting center (progress reports, student summaries)
- Dashboards and insights for annual IEP planning



Free Worksheet

Standardizing IEP Documentation

Use this new resource to:

- Reduce documentation burden so teachers can focus on students
- Improve data accuracy and teamwork across staff
- Give teams a simple, clear plan to standardize IEP documentation



Unified Support Tracking for Special Education Teams



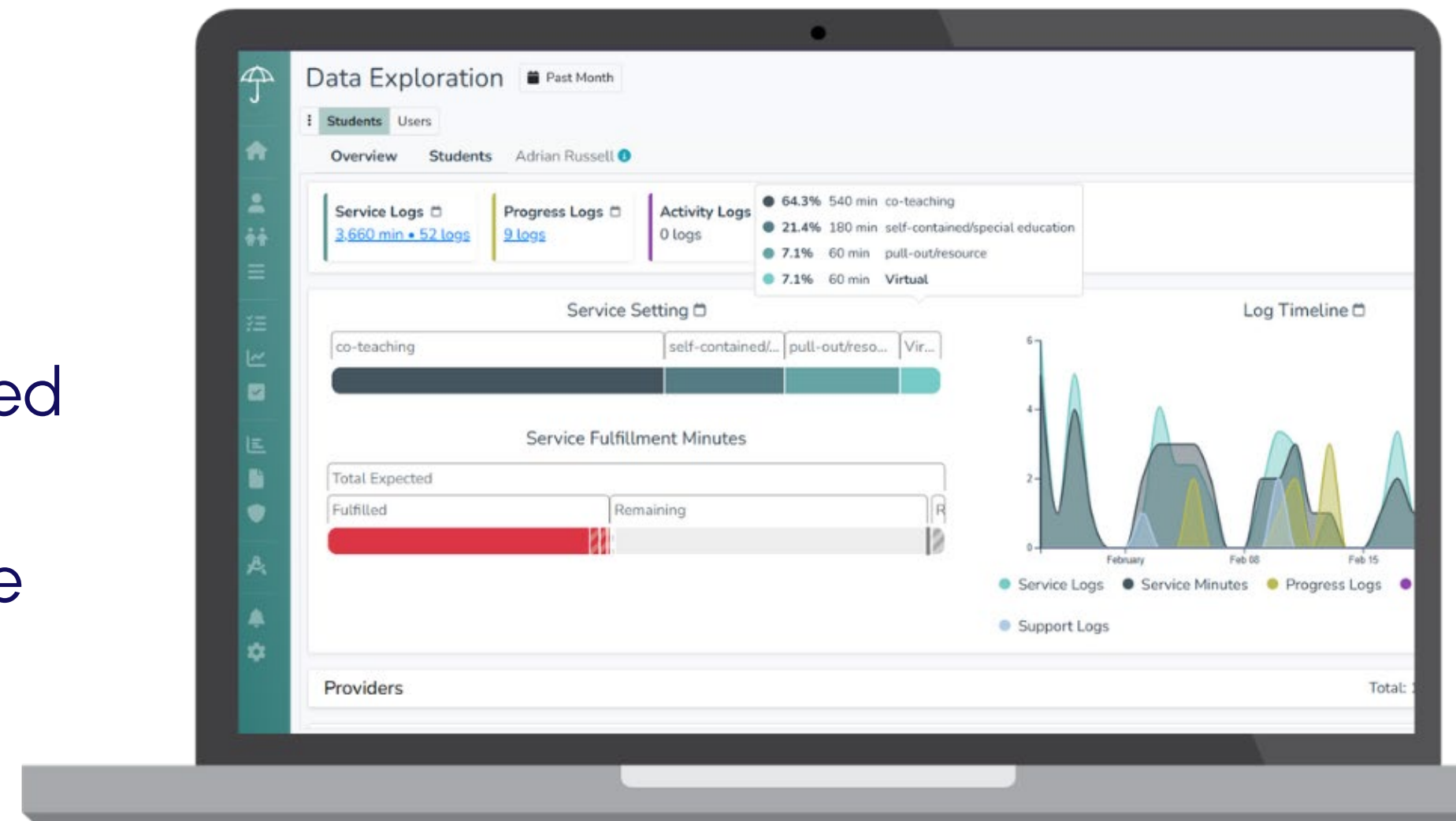
Register Now!

Live Webinar

March 31 | 1:30 pm ET

Join us to learn how **Brolly** can:

- **Reduce staff workload** through streamlined documentation
- **Monitor progress and services** in real time
- **Strengthen compliance** confidence with built-in reporting tools





Q&A



Want to learn more?
Visit www.leveldata.com/Brolly