

PLANNING NOTES



FAST FACTS # 4 (5/15)

What are Planning Notes?

Planning Notes are used to collect and record data from a variety of sources about a student with a disability. This information is shared with the IEP Team to assist with the development of an appropriate IEP.

Who may complete Planning Notes?

The following individuals may complete Planning Notes:

Parents	Students, when appropriate	ESE Teachers/Therapists
Regular Education Teachers	Evaluators	Others, as appropriate

What information should be included in Planning Notes?

The Planning Notes should include information about the student's needs in the following domains:

- Curriculum/Learning
- Social/Emotional
- Independent Functioning
- Communication
- Health Care

Additional input such as strengths of the student, concerns of the parent, needs related to statewide/district assessments, progress on previous goals/objectives, suggested new goals, impact of disability, transition needs, attendance, attention, homework completion, etc., should also be provided when relevant.

Where are Planning Notes maintained after an IEP meeting?

All Planning Notes that have been provided to the IEP Team should be maintained in the Student Resource Folder upon completion of the IEP meeting. Additionally, when Planning Notes are used as input from a required IEP Team member (e.g., the student's Regular Education Teacher) who has been excused by the parent and district from attending the IEP meeting, then these Planning Notes must be provided to the parent and the other IEP Team members in advance of the meeting; and upon completion of the IEP meeting, these Planning Notes must be attached to the IEP documents for distribution to: Parents, Principal/Cumulative Folder, and ESE Case Manager (maintained in the Student Resource Folder). These IEP documents, with the attached Planning Notes, are only to be provided to Central Files for students with a Matrix ESE Support Level 4 or 5.

Should parents be provided with copies of Planning Notes?

When Planning Notes are maintained by school or district personnel, they become educational records and must be provided to parents upon their request for student records. When Planning Notes are being used to provide written input in advance of the IEP meeting, they must be provided to parents in a timely manner and are typically provided to parents with the *Prior Parent Notification*.

Planning Notes used in lieu of a required IEP Team member's attendance at an IEP meeting, when parental consent for excusal has been obtained, must be attached to the IEP documents for distribution to: Parents, Principal/Cumulative Folder, and ESE Case Manager (maintained in the Student Resource Folder). These IEP documents, with the attached Planning Notes, are only to be provided to Central Files for students with a Matrix ESE Support Level 4 or 5.

Where can I learn more about Planning Notes?

If you have questions regarding Planning Notes, you may contact a member of your Area Office's ESE Team which includes the ESE Supervisor, the ESE District Resource Teacher (DRT), the Staffing Coordinator and Staffing Specialists.

You may also contact district ESE personnel at the Velasco Student Services Center or personnel at FDLRS for information and assistance, and/or you may call the ESE Hotline at 273-7221.