



Virtual IEP Meeting Checklist

Prior To the Meeting	✓
Consult with IT Department about internet security	
Set up pre-meeting to review video/tele-conferencing features and/or send “how to” video	
Establish backup plan and ensure all IEP participants have access to the plan and ability to meet	
Schedule backup meeting date/time and/or a follow up meeting if needed	
Plan for extra time in case of technology issues (including optional pre-meeting technology touch base if needed)	
Check that all necessary devices are working and set web platform functions (e.g. check default functions for meeting and set to appropriate functions as needed to ensure confidentiality)	
Create and share agenda and engage the parent and student in agenda setting	
Assign team member tasks (note taker, time keeper, facilitator, etc.)	
Email or snail mail necessary documents to all IEP team participants	
Send parents Procedural Safeguards information	
Send out Notice of Team Meeting (I-1)	
Team members that are unable to attend have been properly excused with written agreement signed by parents (I-2)	
Arrange necessary accommodations including those that may require additional technology supports	
Arrange for a translator if needed and have documents translated and sent to parents if needed	
Contact team members prior to meeting to review basic video-conferencing norms	
Offer team members a brief meeting to go through the features of video-conferencing platform OR send short video with narrative on how to use the features of the video-conferencing platform	
Contact parents and arrange a brief meeting to ensure they know how to use the video-conferencing platform	
Address any questions parents may have	



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Immediately Prior to Meeting	✓
Identify best location in building, home, room at the time for internet signal strength	
Preview video for background (set filters or background screens as available)	
Avoid window/lighting in background	
Check your mic and speakers	
Familiarize yourself with video conference features (e.g. screen share, chat, etc.)	
Set up closed captioning if needed	

At Beginning of Meeting	✓
Introductions of student, family, and staff and describe roles related to supporting student	
Ensure all team members received needed forms and documents	
Ask a “check in question” to open the meeting	
Establish meeting norms	
Review timelines	
Refer to pages numbers of documents and/or sections during meeting	



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Throughout the Meeting	✓
Be mindful of time, especially if anyone is using a personal device and it's using up data	
Summarize and review highlights of IEP	
If present, allow time for interpreters to translate	
Engage parents and student in discussions and decision making	
Check for consensus among all participants after each section or major decision	
Use parent friendly language and avoid acronyms	
Ask clarifying questions/check for understanding	
Discuss and consider dispute resolution options in the event of disagreement	

After the Meeting	✓
Survey all IEP team members on their experience of virtual meeting	
Conduct follow up phone call or email to parents to get feedback and see if they had questions that may have come up after the meeting	
Assign due dates to complete IEP	
Confer with staff to see if there are suggestions for enhancing future virtual IEP meetings (e.g. what went well, what barriers may have come up, ways to improve the meeting experience)	