



CASE CONFERENCE CHECKLIST

Name of employee: _____

Observer: _____

School/Corporation: _____

Date: _____ Time: _____

Initial Case Conference: _____ Yes _____ No

Employee chairing the conference: _____ Yes _____ No

Employee's role: _____

NOTE: Highlighted areas are responsibilities of case conference chairperson.

	Expectations	Yes	No	Not Observed	Not Applicable
1	Introductions were made.				
2	Checked that all appropriate members were present and Notice of Case Conference is signed.				
3	Purpose of the meeting was shared.				
4	Explanation given: Information appears as a draft starting point, would like input from all				
5	An agenda was reviewed.				
6	Procedural Safeguards were offered/reviewed in accurate and understandable terms.				
7	Discussed progress monitoring (annual goal progress, RtI, and other data).				
8	Discussed present levels in accurate and understandable terms.				
9	Discussed and addressed parent concerns.				
10	Discussed need for reevaluation.				
11	Discussed eligibility decision.				
12	Discussed special considerations and behavior concerns.				
13	Discussed transition.				
14	Discussed state assessments and accommodations.				
15	Suggested goals were aligned with student's present levels.				
16	Recommended services met student's needs and abilities.				
17	Discussed LRE (rationale, potential harmful effects, and placement determination).				
18	Written notes were taken and accurately reflect conversation during case conference.				
19	All appropriate forms/signatures obtained.				
20	Checked for understanding of all case conference committee members and follow-up duties were clarified.				
21	Finalize IEP, print and give parent a copy.				

Strengths/Concerns/General Notes/Recommendations: