

What is the Annual IEP Date Review?

Per state and federal statutes, as well as the assurances made by the Agency of Education on the annual IDEA Grant Application to OSEP, the AOE monitors LEAs to ensure that IEP teams are meeting and reviewing a student's IEP at least once per year. Federal regulations require that

An individualized education program, or an individualized family service plan that meets the requirements of section 636(d), is developed, reviewed, and revised for each child with a disability in accordance with 34 CFR §§300.320 through 300.324, except as provided in §§300.300(b)(3) and 300.300(b)(4). (20 U.S.C. 1412(a)(4); 34 CFR sec.300.112) – also State Board Rule 2361.1-2363.9.

What Data Needs to Be Collected?

These data are monitored by the AOE through a cyclic monitoring based on information collected from the LEA's previous and current Child Count submission. The AOE compares the date between IEPs to ensure that the date reported in the most recent Child Count does not exceed one year (365 days) from the previously reported date. If a student's most recent IEP is greater than 365 days from the previous IEP date, the AOE requires that the LEA verify accuracy through an examination of the student's special education paper file.

Why Is the Annual IEP Date Review important?

Compliance monitoring is federally mandated for states and local school districts to receive federal special education (IDEA) grant funding.

General Instructions for Completing the Annual IEP Date Review Worksheet

The LEA is asked to verify and correct IEP date information that has been identified by the AOE as potentially non-compliant. When dates need revision, the LEA is also required to provide a rationale or clarification for correcting any date previously reported to the AOE. The AOE examines the revisions and clarifications before making a final determination regarding compliance for this monitoring activity.

Description of Data in Each Column

- Col A.** lists a unique student reference numbers (Perm Numbers) associated with a suspected non-compliant IEP. No data entry by the LEA is required. The column is password protected.
- Col B.** lists the Dates of Birth for students in Col A. No data entry by the LEA is required. The column is password protected.
- Col C.** lists the date of the suspected non-compliant IEP from the previous Child Count submission. If the date listed is incorrect, please delete the incorrect date and replace it with the correct one from the student's special education paper file.

Annual Date Review Instructions – IEPs



- Col D.** lists the date of the suspected non-compliant IEP from the current Child Count submission. If the date listed is incorrect, please delete the incorrect date and replace it with the correct one from the student’s special education paper file.
- Col E.** lists the days between the previous and current IEPs. No data entry by the LEA is required. Each cell automatically populates, based on the dates in C and D.
- Col F.** requires the LEA to provide a rationale or clarification for any revisions made.
- Col G.** This column calculates a new potential compliance status based on revisions provided by the LEA. No data entry by the LEA is required. The column is password protected.

Please note: The AOE examines the revisions and clarifications before making a final determination regarding compliance for this monitoring activity.

Cell G1 Calculates the original suspected non-compliant IEP. No data entry is required.

Cell G2 Calculates the number of suspected IEPs revised by the LEA. No data entry is required.

General Instructions for Submitting the Annual Date Review – IEP Worksheet

All cyclic monitoring submissions and reviews are conducted through IDEA Consolidated Monitoring section of the AOE’s Grants Management System.

For questions, please contact:

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