Meraki

Exercise Freedom

A FREE GIFT FOR FAMILIES

The Parent Record Kit

Eight simple forms for keeping a calm, dated record of your child's school matters.

1 Request Record
2 Step Record
3 Meeting Record
4 Call-to-Email Confirmation
5 Communication Log
6 Open Items Table
7 Index of Records
8 Participation Accommodation Request

Free to print and share

A Meraki Parent Series resource

BEFORE YOU START

How to use these forms

School matters move through emails, calls and meetings, and it's easy to lose track of what was asked, what was said and what was decided. These forms help you keep one calm, dated record, so that everyone, you included, can rely on the same facts.

1	**Request Record**	Any request you make in writing.
2	**Step Record**	A process reaches a step that should leave a trace.
3	**Meeting Record**	Before and right after any meeting.
4	**Call-to-Email Confirmation**	Something important was said out loud.
5	**Communication Log**	Every contact, one line each.
6	**Open Items Table**	Answers are partial, general or scattered.
7	**Index of Records**	The record gets long, or someone else needs to review it.
8	**Participation Accommodation Request**	You need an accommodation to take part in a meeting.

Write what was said and decided. Leave impressions about people out of it.

Keep it short and dated. Every entry needs a date. Quote people's words when you're sure of them; otherwise, summarize plainly.

Be courteous, always. Forms that go to the school are offered as optional and say so. A form that isn't returned is simply noted, and nothing more is read into it.

Keep originals. Save emails and letters unedited, and make notes on a copy.

Look after your family too. Advocating for a child can be stressful. If it's weighing on you or your child, talking it through with a counselor can help.

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THE PARENT RECORD KIT · FORM 1

Request Record

USE IT WHEN
You make any request in writing.

SEND IT?
Optional: attach it to your request, or keep it for yourself.

KEEP
With the request it records, and log both.

Request to (role / office)

Sent (date, time, method)

About (child / matter)

My requested response date — a courtesy date I am asking for; not a legal deadline

Legal deadline, if one applies — date: _____ source: _____ (leave blank if not confirmed)

This one-page form is offered to keep the record of this request simple and accurate for everyone. Completing Part A is optional. If it is not returned by my requested date, I will complete Part B from my own records and keep it with them. Nothing will be inferred from the form not being returned. If the school believes Part B is inaccurate, it may provide the dated record that shows otherwise, and Part B will be amended to reflect that record.

Part A · Completed by the school

optional

Received by (role) and date

#	Item requested	Provided / done	Partly	Not provided	Date, or reason if not provided
1					
2					
3					
4					

I have reviewed this record and am responsible for its contents. Name, role, signature _____ Date _____

Part B · Parent's record

completed only if Part A is not returned

Receipt acknowledged ☐ Yes, on _____ ☐ No

Response received ☐ Yes, on _____ ☐ No response by my requested date

Status ☐ Clarification asked of me ☐ Pending, with a stated date ☐ Complete ☐ Partly complete ☐ Declined (reason: ☐ stated ☐ not stated) ☐ No response

Sources (dated)

Next step ☐ None needed ☐ Follow-up sent _____ ☐ Other: _____

Parent / guardian (signature) _____ Date _____

Part B is the parent's own record. It is not a school acknowledgment and records only what dated documents show. It is amended only on the basis of a dated record, not a later account. This form does not change the request or any deadline that applies to it.

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THE PARENT RECORD KIT · FORM 2

Step Record

Day ___ since _____ (start date)

USE IT WHEN
A process reaches a step that should leave a trace.

SEND IT?
Optional: offer Part A to the school with a return date.

KEEP
One per step, in date order.

Process (e.g., evaluation)

Step to be recorded

My submission and its date

Requested return date — a courtesy date; not a legal deadline

This one-page form is offered to keep the record of this step simple and accurate for everyone. Completing it is optional, and I recognize it adds to the school's work, so I have limited it to what a reviewer would need. If Part A is not returned by the date above, I will complete Part B from my own correspondence, sign it and keep it with my records. Nothing will be inferred from a form not being returned. If the school believes Part B is inaccurate, it may provide the dated record that shows otherwise, and Part B will be amended to reflect that record.

Part A · Completed by the school

optional

Received by (role, date)

Routed to (role)

Action taken on this step

Procedure applied (name, date)

Next step and anticipated date

I have reviewed this record and am responsible for its contents. Name, role, signature

Date

Part B · Parent's record

completed only if Part A is not returned

Part A returned ☐ No, as of the date below ☐ Partly ☐ Declined in writing

What the record shows

Sources (dated)

Not stated in the record

Parent / guardian (signature)

Date

Part B is the parent's own record. It is not a school acknowledgment and records only what dated documents show. It is amended only on the basis of a dated record, not a later account.

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THE PARENT RECORD KIT · FORM 3

Meeting Record

USE IT WHEN
Before and right after any meeting.

SEND IT?
No. Send Form 4 (the confirmation email) instead.

KEEP
With the agenda and anything handed out.

Date, time, length

Format / place ☐ In person ☐ Video ☐ Phone Location: _____

Purpose, as stated in the notice

Documents received (before / at)

Attendees

by role

Role	Present for	Role	Present for

Topics

quote the words used where you can

#	Proposed or asked by whom (role)	Decided	Who does what, by when
1			
2			
3			
4			

Left open (not decided)

Next meeting or date

Confirmation email sent Yes, on _____ at _____ (Form 4) Correction received: ☐ None ☐ Yes, on _____

Your own notes, not official minutes. Write what was said and decided; leave impressions about people out of it.

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THE PARENT RECORD KIT · FORM 4

Call-to-Email Confirmation

Send the same day, or the next morning

USE IT WHEN
Something important was said out loud.

SEND IT?
Yes, to the person you spoke with.

KEEP
The sent email, and any reply. Log both.

Template

adapt freely; keep it short

Subject: Confirming our conversation on _____

Dear _____,

Thank you for speaking with me today at _____ about _____

. To make sure I understood correctly:

1. _____

2. _____

3. _____

You said you would _____ by _____.

I will _____ by _____.

If I've misunderstood anything, please let me know by _____ so I can correct my notes.

Thank you,

_____

Before you send

check each one

- ☐ Sent to the person I spoke with
- ☐ Date and time of the conversation included
- ☐ Points numbered, one per line
- ☐ Their words quoted where I'm sure of them
- ☐ Who does what, by when
- ☐ An invitation to correct, with a date
- ☐ No new requests or complaints added
- ☐ Logged on Form 5

No reply is not agreement. An unanswered confirmation shows what you sent and when. It doesn't show the school agreed, and it shouldn't be described that way later.

Why no new requests? A confirmation email is easy to agree with. Add a new request and it becomes something to negotiate, and the confirmation gets lost. Send new requests separately, on Form 1.

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THE PARENT RECORD KIT · FORM 5

Communication Log

One line for every contact:
email, call, meeting, letter, note home

Child / matter: School / district: _____ Page ___ of ___

Date & time	With (by role)	How email · call · mtg · letter	What I asked or said	What they said quote if you can	Follow-up owed by whom · by when	Saved as file / folder

WAS IT SPOKEN?
Log it, then send Form 4 the same day. Log the email too.

NO ANSWER BY THE DATE?
Write "No response as of [date]." That's the whole entry.

KEEP ORIGINALS
Save emails and letters unedited. Make notes on a copy.

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THE PARENT RECORD KIT · FORM 6

Open Items Table

As of _____

USE IT WHEN
Answers are partial, general or scattered across emails.

SEND IT?
Optional: it can go with a follow-up email.

KEEP
Update it; keep each dated version.

#	My question exactly as asked · date	Their answer quoted · date · source	Answered? yes · partly · no	What remains open as a narrower question
1				
2				
3				
4				
5				
6				

Example row

a fictional family

1	“When will the evaluation begin?” (Oct 3)	“We will move forward in a timely manner.” (case manager, email, Oct 10)	Partly	Please give the date the evaluation will begin, or the date you expect to set it.

Quote answers in full and without comment. The comparison between question and answer does the work; adjectives only weaken it.

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Index of Records

USE IT WHEN
The record gets long, or someone else needs to review it.

SEND IT?
When you share documents; numbers must match.

KEEP
Number in date order. Never renumber.

Child / matter: Prepared on: _____

#	Date	Document what it is, in plain words	From → To by role · mark P if parent-made	Pages	Where saved	Shared with · date
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						

Before sharing any document, remove other people's private details: other children's names, personal phone numbers and personal email addresses.

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THE PARENT RECORD KIT · FORM 8

Participation Accommodation Request

For parents and guardians with disabilities

USE IT WHEN
You need an accommodation to take part in a meeting or process.

SEND IT?
Yes, ideally well before the meeting.

KEEP
With the reply. Log both.

To: _____ Date: _____

I am the parent / guardian of _____, and I will be taking part in _____ on _____.

Because of a disability, I am requesting the following accommodation(s) so that I can participate fully. I am making this request under the Americans with Disabilities Act, and I am glad to discuss alternatives that would meet the same need.

- ☐ Agenda and documents at least ____ days in advance
- ☐ Documents in an accessible format: _____
- ☐ Breaks during the meeting, about every ____ minutes
- ☐ Additional time to review before responding
- ☐ Participation by video or phone
- ☐ A support person present
- ☐ A written summary of decisions after the meeting
- ☐ Questions and answers in writing
- ☐ An interpreter or communication support: _____
- ☐ Other: _____

What these would help with (describe the need, not a diagnosis):

_____

_____

Please let me know in writing by _____ which accommodations will be provided, and, if any will not, the reason and any alternative offered.

Thank you,

_____

For your record

complete when the reply arrives

Reply received	☐ Yes, on _____ from (role) _____ ☐ No reply as of _____
Provided	
Not provided (reason given)	
Alternative offered	

You generally don't need to name a diagnosis to ask; describe what you need to participate. Whether and how a particular law applies depends on your situation. For guidance, contact your state's protection and advocacy organization.

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