Merakī

Exercise Freedom

THE PARENT RECORD KIT · ADVANCED

Process Documents

Three forms for IEP, 504 and grievance processes, when a step needs a dated, courteous record.

BEFORE YOU START

How to use these forms

Some school processes move slowly or quietly: an evaluation request, a 504 meeting, a formal complaint. These three forms help you keep a record of each step that anyone could check later, without arguing and without guessing at anyone's reasons.

Step Record	A process reaches a step that should leave a trace: a request, a meeting, a decision, a deadline. Offer it with a return date; complete Part B yourself if it isn't returned.
Acknowledgment of Receipt	You submit something formal and want to know it arrived, who has it, and what happens next.
Addendum Record	Something relevant happens after you've submitted, and you want to add it to the record as dated facts.

The rules that keep a record trustworthy

> **Facts, dates and sources only.** Quote what was written. Leave out guesses about anyone's intent.

> **Never date a form before you sign it.** Complete Part B on the day it's due, from what the record shows that day.

> **Include the replies that came another way.** If the school answered by email instead of returning the form, say so.

> **An unanswered request is not a granted one.** Keep to the original deadline unless a change is confirmed in writing.

> **Keep originals unedited.** Save emails and letters as received; make notes on copies.

These forms don't change any request, deadline or right that applies to you, and they aren't legal advice. For guidance, contact your state's Parent Training and Information Center or protection and advocacy organization, or an attorney.

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THE PARENT RECORD KIT · PROCESS DOCUMENTS

Step Record

Day ___ SINCE _____ (START DATE)

Process ☐ IEP ☐ 504 ☐ Evaluation ☐ Grievance or complaint ☐ Other: _____

Step to be recorded

My submission and its date

Please return by a courtesy date; not a legal deadline

Questions and responses, by day

dates only; no characterization

DAY	DATE	QUESTION OR REQUEST	RESPONSE, AS OF DAY ___

This one-page form is offered to keep the record of this step simple and accurate for everyone. Completing it is optional. 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 (name, title, date)

Routed to (role)

Action taken on this step

Procedure applied (title, date)

Next step and anticipated date

For complaints: reviewer independent of the people and conduct under review ☐ Yes ☐ No If no, safeguard: _____

_____ _____

I have reviewed this record and am responsible for its contents. Name and title of the individual completing this form, 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 records only what dated documents show and is not attributed to the school. It is amended only on the basis of a dated record, not a later account. An unanswered request is not treated as granted.

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OPTIONAL RETURN SLIP · THE PARENT RECORD KIT

Acknowledgment of Receipt

For the school's convenience. Completing and returning this page acknowledges receipt of the submission described below. Any written acknowledgment in another form is equally welcome.

Submission

What was submitted	
Date and method	
Sent to (role)	

Receipt

completed by the school

Received	☐ Received; it will be processed as submitted ☐ Received; more information is needed (below)
Received by (name)	
Title	
Date received	

Administration

completed by the school

Responsible coordinator or case manager	
Contact	
Assigned reviewer (name, role)	
Expected timeframe	

Additional information needed

This page is optional and creates no obligation beyond those that already apply. I take part in this process without waiving any objection or any other remedy available to me.

Parent's record

completed by the parent

This page returned	☐ No, as of _____ ☐ Yes, on _____
Acknowledged in another form	☐ No ☐ Yes: date _____ from (role) _____

_____ _____

Parent / guardian (signature) Date

Record silence honestly: if receipt was acknowledged some other way, note it here.

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Addendum Record

Day ___ ___ ___
SINCE _____ (START DATE)

Original submission and date

Relates to (issue or section)

Items through (date, time) later items go in a later addendum

Please return by a courtesy date; not a legal deadline

Items added

dated facts, offered without characterization

#	DATE AND TIME	ITEM (QUOTE IT; DON'T DESCRIBE IT)	IDENTIFIER OR SOURCE	COPY HELD
1				
2				
3				
4				
5				
6				
7				
8				
9				

Part A · Completed by the school

optional

Received by (name, title, date)

Will be considered with ☐ The original submission ☐ Other: _____ ☐ Not considered (reason): _____

_____ _____

I have reviewed this record and am responsible for its contents. Date

Name and title of the individual completing this form, signature

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

_____ _____

Parent / guardian (signature) Date

Items are listed as dated facts. Listing an item is not a characterization of any person's intent. Materials that include other people are held by the parent and available on request rather than attached.

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