

IEP Psychoeducational Input Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · August 2026

IEP psychoeducational input is an outside clinician's written report to a school team: findings, educationally relevant functional effects, and recommendations offered for the IEP process. No law prescribes the letter; IDEA prescribes what the school must do with it. The team must consider it; it decides what to adopt.

Header, recipient & purpose say what it is and is not

Do: date, student identifiers, your degree and license, the recipient, and one purpose sentence naming the document type.

Pitfall: no purpose line; a treatment summary gets read as a full evaluation and tested against criteria it never claimed to meet.

Authorization & treatment relationship consent before it travels

Do: record the signed authorization date and scope, then the basis of your knowledge: role, duration, frequency.

Pitfall: PHI sent without authorization; at the school your report becomes a FERPA education record with different rules.

Sources of information fact / collateral / opinion

Do: list sessions, interviews, rating scales, records reviewed, any testing; note the language of assessment.

Pitfall: secondhand reports written as direct findings; name the informant for every claim.

Findings & index scores scores travel, items do not

Do: report each instrument with dates, index scores with percentiles, and a validity statement; if you did not test, say so.

Pitfall: quoting test items or attaching protocols; item content compromises test security and helps nobody.

Educationally relevant functional effects the section the team acts on

Do: translate findings into attendance, concentration, regulation, transitions, work completion, and access to instruction.

Pitfall: stopping at the diagnosis; IDEA eligibility turns on educational need, not the label.

Recommendations for team consideration input, not prescription

Do: tie each support to a finding, frame it for the team, and name the data to review at the next annual review.

Pitfall: prescribing minutes, placement, or an aide; IDEA assigns programming decisions to the team.

Scope, limitations & signature the close that protects the letter

Do: state what you did not do (no classroom observation), offer meeting availability, sign with credentials and date.

Pitfall: an unscoped, unsigned letter; supervised practice may also require a supervisor co-signature.

Before you sign

- ☐ Purpose line states what this is and is not
- ☐ Signed authorization dated and on file
- ☐ Fact, collateral, and opinion kept separate
- ☐ Index scores only, with a validity statement
- ☐ Each finding translated to a classroom effect
- ☐ Recommendations tied to findings, for the team
- ☐ Scope limits stated; signed with credentials

Drafting with AI

Capture bullets after your file review: index scores with percentiles, functional effects with informants, three recommendations, what you did not assess.

"Draft an IEP input addendum from these bullets, fourth grader, private evaluation completed July, eligibility meeting 08/19: ..."

Never paste student-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

300 to 900 words
typical input letter

30 to 60 min by hand
clinical team estimate

Considered, not adopted
what IDEA requires of the team

IEP team · parents
who reads it

IEP Psychoeducational Input Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Student (initials): _____ DOB / grade: _____ Assessment date(s): _____ Meeting date: _____

Clinician / credentials / license: _____ Recipient (district / team): _____ Authorization date: _____

Purpose & scope

What this document is (treatment input, evaluation excerpt, full report) and is not; its relation to the district's own evaluation

Treatment relationship & sources

Role and duration; sessions, interviews, rating scales, records reviewed, testing; language of assessment; fact / collateral / opinion

Findings / index scores

Instrument, date, index or composite score, percentile, range; validity statement; index scores only, no item content

Educationally relevant functional effects

Attendance, concentration, regulation, transitions, work completion, peer interaction, access to instruction; informant for each

Recommendations for team consideration

Each tied to a finding, framed for the team; data to review at the next annual review

Scope & limitations

What was not done (classroom observation, academic testing); competence limits; offer to attend or consult

Available for IEP meeting? Y / N / phone _____ Signature / credentials: _____ Date signed: _____

Supervisor co-signature (if required): _____