

End-of-the-Year Checklist for School Speech-Language Therapists

Use this checklist to close out the school year, stay compliant, and prepare for a smoother start next year.

Area	Checklist Item	Completed
Student Services	Review each student's IEP to confirm all speech-language services were provided as written.	<input type="checkbox"/>
Student Services	Document any missed sessions and make sure make-up sessions are completed or clearly noted according to district procedures.	<input type="checkbox"/>
Student Services	Confirm service logs are complete, accurate, and up to date.	<input type="checkbox"/>
Student Services	Review student progress toward annual IEP goals.	<input type="checkbox"/>
Student Services	Complete final progress reports for each student.	<input type="checkbox"/>
Student Services	Make sure progress reports are shared with families by the required timeline.	<input type="checkbox"/>
IEP Compliance	Check upcoming annual review dates for students on your caseload.	<input type="checkbox"/>
IEP Compliance	Check reevaluation due dates for students on your caseload.	<input type="checkbox"/>
IEP Compliance	Confirm that all meetings held this year have finalized paperwork.	<input type="checkbox"/>
IEP Compliance	Make sure IEP amendments, meeting notes, consent forms, and eligibility documents are filed correctly.	<input type="checkbox"/>
IEP Compliance	Notify the special education case manager of any unresolved compliance concerns.	<input type="checkbox"/>
Evaluations	Complete all speech-language evaluations due before the end of the school year.	<input type="checkbox"/>
Evaluations	Finalize evaluation reports and submit them according to district timelines.	<input type="checkbox"/>
Evaluations	Confirm eligibility meeting paperwork is completed and filed.	<input type="checkbox"/>
Evaluations	Create a list of evaluations that will need attention at the beginning of next school year.	<input type="checkbox"/>
Caseload Management	Update your current caseload list.	<input type="checkbox"/>
Caseload Management	Identify students who are exiting, transferring, or moving to a new school.	<input type="checkbox"/>
Caseload Management	Prepare transition notes for students moving to another building or therapist.	<input type="checkbox"/>
Caseload Management	Note students who may need schedule changes, increased support, or review next year.	<input type="checkbox"/>

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Area	Checklist Item	Completed
Data and Progress Monitoring	Organize student data sheets, therapy notes, and progress-monitoring records.	<input type="checkbox"/>
Data and Progress Monitoring	Summarize key strengths, needs, and recommended next steps for each student.	<input type="checkbox"/>
Data and Progress Monitoring	Identify students who made strong progress and students who may need goal revisions.	<input type="checkbox"/>
Family and Staff Communication	Send any needed end-of-year updates to families.	<input type="checkbox"/>
Family and Staff Communication	Share relevant student updates with teachers, case managers, and administrators.	<input type="checkbox"/>
Family and Staff Communication	Provide summer practice ideas for students, when appropriate.	<input type="checkbox"/>
Family and Staff Communication	Document any parent concerns or follow-up needs for next year.	<input type="checkbox"/>
Materials and Equipment	Clean and organize therapy materials.	<input type="checkbox"/>
Materials and Equipment	Inventory assessment kits, protocols, therapy tools, AAC devices, and technology.	<input type="checkbox"/>
Materials and Equipment	Check that borrowed items are returned.	<input type="checkbox"/>
Materials and Equipment	Report missing, damaged, or needed materials to the appropriate staff member.	<input type="checkbox"/>
AAC and Assistive Technology	Confirm that AAC devices are returned, updated, or sent home according to the student's plan.	<input type="checkbox"/>
AAC and Assistive Technology	Back up important student communication files, if allowed by district policy.	<input type="checkbox"/>
AAC and Assistive Technology	Document device use, needs, and recommendations for next year.	<input type="checkbox"/>
Workspace Closeout	Secure confidential student records.	<input type="checkbox"/>
Workspace Closeout	Shred or properly dispose of duplicate confidential documents.	<input type="checkbox"/>
Workspace Closeout	Organize digital files according to district procedures.	<input type="checkbox"/>
Workspace Closeout	Clean and reset the therapy space.	<input type="checkbox"/>
Planning for Next Year	Create a beginning-of-year priority list.	<input type="checkbox"/>
Planning for Next Year	List students who need immediate scheduling when school begins.	<input type="checkbox"/>

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Area	Checklist Item	Completed
Planning for Next Year	List upcoming annual IEPs and reevaluations for the first quarter.	<input type="checkbox"/>
Planning for Next Year	Note professional development, training, or support needed for next year.	<input type="checkbox"/>

End-of-Year Reflection Questions

Reflection Question	Notes
Which students made the most progress this year, and what strategies helped?	
Which students need closer monitoring next year?	
What therapy routines worked well?	
What documentation or scheduling systems need improvement?	
What materials, assessments, or tools should be requested for next year?	
What is one thing I can do now to make the first month of next year easier?	