



SCHOOL-TO-HOME TRANSITION

Before You Withdraw: Records & Questions Checklist

Preserve useful information, verify official requirements, and plan the first weeks at home.

How the brands connect: Created by Homeschool Momentum, the parent-planning membership from Special Ed Resource. Shared free through SpecialEdHomeschooling.com.

What this tool will help you do

School documents can preserve valuable history, but they do not automatically become a homeschool plan. This guide helps you save the record trail, separate official questions from parent decisions, translate useful supports for home, and create a calmer first-week bridge.

Inside this guide

Save the record trail

1

Request useful plans, evaluations, progress information, and representative work.

Verify before status changes

2

Record the official source, date, answer, and next step.

Translate useful supports

3

Carry forward what helped without copying school structure blindly.

Plan the first week

4

Protect connection, recovery, and one manageable learning invitation.

Start here: Do not delay urgent safety or health support to finish paperwork. Use this guide for education planning and verify legal or service questions with the correct official source.



GUIDED PARENT WORKBOOK

Save the useful record trail

Request copies for your private family records before portal access or school status changes. Use a secure process when records contain sensitive information.

☐ Current and prior IEP or 504 plans.

☐ Evaluations, eligibility reports, and progress reports.

☐ Accommodation lists and assistive-technology notes.

☐ Recent work samples or assessment summaries.

☐ Attendance, transcript, course, credit, and grade records when relevant.

☐ Service history and provider recommendations already shared with the school.

☐ Behavior, safety, health, or transition plans the family may need for continuity.

RECORDS REQUESTED ON

SCHOOL CONTACT AND METHOD

RECORDS RECEIVED

MISSING ITEMS

FOLLOW-UP DATE

WORDS A PARENT CAN USE

Please provide a complete copy of the educational records available to the parent, including current plans, evaluations, progress information, accommodation history, and relevant course records.



GUIDED PARENT WORKBOOK

Separate official questions from family planning

Write down the answer and the source. A helpful conversation is not the same as a current written rule for your state and situation.

☐ What withdrawal, notice, enrollment, or recordkeeping step does our state require?

☐ What happens to current services after withdrawal?

☐ Can the district offer evaluations or services to homeschool children, and through what process?

☐ Which records transfer automatically and which must the parent request?

☐ Are deadlines connected to courses, credits, athletics, services, or funding?

☐ Which question requires an attorney, qualified professional, program administrator, or other official source?

QUESTION

OFFICIAL SOURCE OR QUALIFIED CONTACT

ANSWER CHECKED ON

LINK OR WRITTEN REFERENCE

NEXT ACTION

Calm review question: Can we point to the source that supports this decision, or are we relying on memory and assumptions?



GUIDED PARENT WORKBOOK

Translate the useful parts - do not copy the whole school day

Use school records as evidence of needs, supports, and prior response. Build the home version around the child and family now.

DECISION	WHAT TO ASK	R	A	G
Need	What learning or access need does the record describe?	☐	☐	☐
Support	Which accommodation, tool, format, or teaching approach was useful?	☐	☐	☐
Evidence	What showed that it helped, did not help, or remains uncertain?	☐	☐	☐
Home version	What is the smallest practical version to try at home?	☐	☐	☐
Review	When and how will the family review the home version?	☐	☐	☐

ONE SUPPORT TO CARRY FORWARD

ONE SUPPORT TO SIMPLIFY

ONE SCHOOL ROUTINE WE DO NOT NEED TO RECREATE

REVIEW DATE

Worked example: School support: extended written time. Home translation: separate knowledge from handwriting; allow oral explanation first, then one short written response with speech-to-text available.



GUIDED PARENT WORKBOOK

Build a first-week bridge instead of a full semester

The first week can gather information while protecting connection and recovery. It does not need to prove that every future homeschool day will work.

Connection anchor

1

A predictable moment with no performance demand.

Learning invitation

2

One short, accessible activity tied to interest or a current priority.

Body or recovery anchor

3

Movement, food, rest, outside time, health routines, or sensory support.

Stopping point

4

A clear signal that the planned learning is complete for today.

OUR CONNECTION ANCHOR

OUR LEARNING INVITATION

OUR BODY/RECOVERY ANCHOR

OUR STOPPING POINT

WHAT WE WILL OBSERVE WITHOUT JUDGING

WORDS A PARENT CAN USE

This first week is for beginning safely and learning what fits. We do not have to recreate school at home.



GUIDED PARENT WORKBOOK

Close the transition loop

At the end of the first week, review records, official answers, home supports, and family capacity together.

DECISION	WHAT TO ASK	R	A	G
Records	What arrived, and what still needs follow-up?	☐	☐	☐
Requirements	Which official questions are answered and documented?	☐	☐	☐
Access	Which support made learning more usable at home?	☐	☐	☐
Capacity	What could the family realistically sustain?	☐	☐	☐
Next step	Keep, adjust, pause, or seek qualified help?	☐	☐	☐

WHAT BECAME CLEARER

WHAT REMAINS UNCERTAIN

ONE SUPPORT TO KEEP

ONE QUESTION FOR A QUALIFIED PROFESSIONAL

NEXT REVIEW DATE

Calm review question: What does the family need next: more time, a smaller plan, direct instruction, professional support, or an official answer?

YOUR NEXT CALM STEP

Turn preserved information into a workable first plan.

This checklist helps you protect records and questions before the transition. The \$99 Personalized Homeschool Plan helps turn that information into a manageable starting structure for learning at home.

See the Personalized Homeschool Plan

<https://specialiedhomeschooling.com/homeschool-plan/>

Read the IEP-to-homeschool transition guide

<https://specialiedhomeschooling.com/iep-to-homeschool/>