Special Education Director of Record: SY 2026-27
Year-at-a-Glance

Annual Deadlines

Annual Detailed View

Please note: dates are as accurate as possible and subject to change. As ESSU is notified of any changes, we will update these documents and send notifications to the Directors' listserv.

Common Abbreviations

EOY = End of Year

OSEP = Office of Special Education Programs at the Federal Department of Education

Sig Dispro = Significant Disproportionality

SPP/APR = State Performance Plan / Annual Performance Report

The IDEA requires each state to develop a state performance plan/annual performance report (SPP/APR) that evaluates the state's efforts to implement the requirements and purposes of the IDEA and describes how the state will improve its implementation.

The SPP/APR includes indicators that measure child and family outcomes and other indicators that measure compliance with the requirements of the IDEA.

Annual Deadlines - Report Due Dates

Jun 25, 2026

- [ ] 2025-26 SPED Discipline Report Due (SPP/APR Indicator 4 & Sig Dispro)

Aug 31, 2026

- [ ] 2026-27 Federal IDEA Part B & Preschool Application Project Narratives (Amendment)

Sep 30, 2026

- [ ] Post School Outcomes Interviews (SPP/APR Indicator 14)

Oct 1, 2026

- [ ] 2025-26 SPED EOY Snapshot Due (SPP/APR Indicators 1, 2, 11 & 12, sample for 14)

Oct 30, 2026

- [ ] 2026-27 Federal IDEA Part B & Preschool Application Budget
- [ ] 2025-26 EOY Federal IDEA Part B & Preschool Expenditure Report
- [ ] 2025-26 Federal IDEA Part B & Preschool Project Narrative Performance Reports

Jan 29, 2027

- [ ] 2026-27 Federal IDEA Part B & Preschool Application Project Narratives (Amendment)

Feb 19, 2027

- [ ] December Count - SPED Student & Staff final report (SPP/APR Indicators 9 & 10 and Sig Dispro)

Feb 26, 2027

- [ ] 2026-27 Federal IDEA Part B & Preschool Budget Revision

Mar 2, 2026

- [ ] High-Cost Reimbursement Application Collection

May 1, 2027

- [ ] Annual IEP Standard Record Reviews Due

Jun 30, 2027

- [ ] 2027-28 Federal IDEA Part B & Preschool Application Project Narratives (New 3-yr cycle)
- [ ] 2027-28 Special Education Fiscal Assurances/Board Certifications/Project F
- [ ] 2026-27 Parent Involvement Survey (SPP/APR Indicator 8)
- [ ] 2026-27 Annual Restraint and Seclusion Act (RSA) Report
- [ ] 2026-27 Results Matter OSEP Exit Report (SPP/APR Indicator 7)

Annual Detailed View

July 2026

On-going

2025-26 SPED EOY Snapshot Student Report (Indicators 1, 2, 11 & 12, sample for 14)
Window closes Oct 1
Data Pipeline Snapshots – SPED End of Year

2025-26 Federal IDEA Part B and Preschool Performance Reports
Window closes Oct 31
ESSU Data Management System: DMS

Post School Outcomes Interviews (Indicator 14)
Window closes Sept 30
Post School Interview Outcomes

Student Attendance data collection for Abbreviated School Day Schedules
Verify attendance coding across AU member districts of students in special education placed on Abbreviated School Day Schedules
Student Attendance

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Staff Recruitment - review staffing allocations across schools, including SSPs and balance accordingly. *Educator Recruitment & Retention*
- Review/revise Job Descriptions
- SB 191 Annual Orientation - develop supervision list for evaluations, induction list with mentors for Special Ed/SSP staff. *Educator Effectiveness Office*

Professional Development & Resources

- Plan for the New Special Education Staff Orientation
- Plan for the New Administrator Orientation
- Prepare the AU Professional Development Calendar
- Review/revise AU Special Education Handbook (Procedures & Policies)
- Prepare/send a Summer Newsletter to all Special Education Service Providers with SY25-26 information.

Other AU responsibilities

- Review AU District/BOCES Policies
- State Assessment data analysis
- Check on Charter Renewal deadlines for SY25-26
- Update AU contacts on CDE-ESSU website:
  - AU Director of Record & SPED Fiscal Contact Form
  - AU Contact for Special Education in County Jails

Special Education Director Resources

- Bookmark *Special Education Directors' Corner* webpage
  - Download Special Education Directors Handbook
  - Download Year-at-a-Glance
- Share, as appropriate, with Director's leadership team

August 2026

Aug 1

IEP Standard Record Review
Window opens Aug 1 - May 1; student lists available
Includes review of Post-Secondary Transition IEPs (Indicator 13)
General Supervision and Monitoring – Standard Record Review

2025-26 EOY Federal IDEA Part B & Preschool Expenditure Report
Window opens August 1 - Oct 31
Identity management / Single Sign-On: IDEA Budget and Expenditure System

Aug 15

New Director Orientation
New or Near New Special Education Directors

Aug 29

2026-27 Federal IDEA Part B & Preschool Application Project Narratives (Amendment)
Amendment due Aug. 29
IDEA – Part B and Preschool Fiscal Resources

On-going

2025-26 EOY Federal IDEA Part B & Preschool Expenditure Report
Window open June 30 - Oct 30
Identity management / Single Sign-On: IDEA Budget and Expenditure System

2025-26 SPED EOY Student Report (Indicators 1, 2, 11 & 12, sample for 14)
Window Opens May 1 - Oct 1
Data Pipeline Snapshots – SPED End of Year

2026-27 Federal IDEA Part B & Preschool Application Budget
Window opens August 1 - Oct 30
ESSU Data Management System: DMS

Post School Outcomes Interviews (Indicator 14)
Window open May 1 - Sept 30
Post School Interview Outcomes

Staff Approval Matrix (SAM) report (December count)
Window closes Dec 1; Review new and current staff licensure, ensure alignment with projected student caseloads
Data Pipeline Snapshots: Special Education December Count
Special Education Endorsement Requirements per Student Disability

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Staff Recruitment - review staffing allocations across schools, including SSPs and balance accordingly. *Educator Recruitment & Retention*
- Review/revise Job Descriptions

- SB 191 Annual Orientation - develop supervision list for evaluations, induction list with mentors for Special Ed/SSP staff. *Educator Effectiveness Office*

Professional Development & Resources

- Plan for the New Special Education Staff Orientation
- Plan for the New Administrator Orientation
- Prepare the AU Professional Development Calendar
- Review/revise AU Special Education Handbook (Procedures & Policies)
- Prepare/send a Summer Newsletter to all Special Education Service Providers with SY26-27 information.

Other AU responsibilities

- Check on Charter Renewal deadlines for SY26-27

September 2026

Sept 1 **Parent Involvement Survey (Indicator 8)**

Window opens Sept 1- June 30; list of names available Sept 1
Indicator 8 – Parent Involvement

Staff Interchange Data
Interchange opens in Sept and the snapshot opens in Nov; Data is used for the December Count report
Data Pipeline Interchanges: Staff

Sept 3 & 4 **Fall SPED Directors Meeting**

Sept 3-4
Special Education Director's Corner

Sept 11 **2025-26 SPED EOY Student Report (Indicators 1, 2, 11 & 12, sample for 14)**

Window Opens May 1 - Oct 1; errors resolved by Sept 17 before duplicates
Data Pipeline Snapshots – SPED End of Year

Sept 30 **Post School Outcomes Interviews (Indicator 14)**

Final data due Sept. 30
Post School Interview Outcomes

On-Going **2025-26 EOY Federal IDEA Part B & Preschool Expenditure Report**

Window open June 30 - Oct 31
Identity management / Single Sign-On: IDEA Budget and Expenditure System

2026-27 Federal IDEA Part B & Preschool Application Budget
ESSU Data Management System: DMS

Staff Approval Matrix (SAM) report for December count
Window closes Dec 1; Review new and current staff licensure, ensure alignment with projected student caseloads
Data Pipeline Snapshots: Special Education December Count
Special Education Endorsement Requirements per Student Disability

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Staff Recruitment - review staffing allocations across schools, including SSPs and balance accordingly. *Educator Recruitment & Retention*
- Review new and current staff licensure - ensure alignment with projected student caseloads to prepare for December Count Report.
- *Special Education Endorsement Requirements per Student Disability*

Professional Development & Resources
Other AU responsibilities

- Check on Charter Renewal deadlines for SY26-27

October 2026

Oct 1 **IEP Interchange**

Window opens Oct 1; Child and participation files can be submitted, Data from these files goes into Dec. Count, SPED Discipline and SPED EOY
Data Pipeline Interchanges: Special Education IEPs

Proportionate Share count
Window open from Oct 1 - Dec 1
IDEA Part B Fiscal Resources - Proportionate Share guidance

Oct 1 **2025-26 SPED EOY Student Report (Indicators 1, 2, 11 & 12, sample for 14)**

Report due Oct 1
Data Pipeline Snapshots – SPED End of Year

Oct 28-29 **Secondary Transition Leadership Institute**

Secondary Transition: Special Education Services for Youth Ages 15-21

Oct 30 **2025-26 EOY Federal IDEA Part B & Preschool Expenditure Report**

Report due Oct 30
Identity management / Single Sign-On: IDEA Budget and Expenditure System

2025-26 Federal IDEA Part B & Preschool Project Narrative Performance Reports
Report due Oct 30
IDEA – Part B and Preschool Fiscal Resources

2026-27 Federal IDEA Part B & Preschool Application Budget

ESSU Data Management System: DMS

On-Going **Staff Approval Matrix (SAM) report for December count**

Window closes Dec 1; Review new and current staff licensure, ensure alignment with projected student caseloads
Data Pipeline Snapshots: Special Education December Count
Special Education Endorsement Requirements per Student Disability

Other Director of Record Responsibilities; may be specific to AU

Preschool Fall checkpoint
Ensure all preschool children with IEPs are included in the Results Matter Assessment
Results Matter Checkpoint Calendar

Regional Child Find and Preschool Special Education Meetings
Professional Learning Opportunities

Human Resources

- Staff Recruitment - review staffing allocations across schools, including SSPs and balance accordingly. *Educator Recruitment & Retention*
- Review new and current staff licensure - ensure alignment with projected student caseloads to prepare for December Count Report.
- *Special Education Endorsement Requirements per Student Disability*

Professional Development & Resources

Other AU responsibilities

November 2026

Nov 2 **December Count and Staff Snapshot**

Window opens Nov 2 - Feb 19 (estimated)
Data Pipeline Snapshots – Special Education December Count

On-going **Regional Child Find and Preschool Special Education Meetings**

Professional Learning Opportunities

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Staff Recruitment - review staffing allocations across schools, including SSPs and balance accordingly. *Educator Recruitment & Retention*
- Review new and current staff licensure - ensure alignment with projected student caseloads to prepare for December Count Report.
- *Special Education Endorsement Requirements per Student Disability*

Professional Development & Resources

Other AU responsibilities

December 2026

Dec 1 **High-Cost Reimbursement Application Collection**

Information on application anticipated Dec 1. Window closes Mar 1.
Special Education Fiscal Advisory Committee (SEFAC)

December Count and Staff Snapshot

Window Nov 2 - Feb 19 (estimated)
Data Pipeline Snapshots – Special Education December Count

December Count Staff Snapshot (SPED HR) Report

SAM: 1.5 impact - SAM Fact Sheet – PDF

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- SB 191: Plan Mid-year Evaluations. *Office of Educator Effectiveness*

Professional Development & Resources

Other AU responsibilities

- Begin budget development for 2027-28

January 2027

Jan 1

2026-27 Federal IDEA Part B & Preschool Application Project Narratives (Amendment)
Second Window Opens Jan 1 - Jan 29
ESSU's IDEA – Part B and Preschool Fiscal Resources

Begin planning & scheduling for the ESY program
Resources- Individualized Education Program (IEP)

Jan 29

December Count: error-free snapshot
Snapshot due Jan 29 (estimated); error-free snapshot due before duplicates
Data Pipeline Snapshots – Special Education December Count

2026-27 Federal IDEA Part B & Preschool Application Project Narrative (Amendment)
Amendment due Jan 29
ESSU's IDEA – Part B and Preschool Fiscal Resources

On-going

High-Cost Reimbursement Application Collection
Window opens Dec 1 - Mar 1
Special Education Fiscal Advisory Committee (SEFAC)

December Count Report
Window Nov 2 - Feb 19 (estimated)
Data Pipeline Snapshots – Special Education December Count

December Count SPED HR Report
Window Nov 2 - Feb 19 (estimated)
Data Pipeline Snapshots – Special Education December Count

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Plan staffing needs for SY 2027-28. *Educator Recruitment & Retention*
- Work with HR to plan for the hiring season

Professional Development & Resources

- Establish a PD team to begin planning & scheduling PD for 2027-28

Other AU responsibilities

- Begin budget development for 2027-28
- Identify and review any Charter schools contracts and MOU

February 2027

Feb 1 **2026-27 Federal IDEA Part B & Preschool Application Budget Revision**

First Window open Feb 1 thru Feb 26
ESSU Data Management System: DMS

Feb 19 **December Count - SPED Student & Staff**

duplicates resolved Final Report DUE 2/19 (estimated)
Data Pipeline Snapshots – Special Education December Count

2026-27 Federal IDEA Part B & Preschool Application Budget Revision

Revised Budget due Feb 26
ESSU Data Management System: DMS

On-going **Preschool Winter checkpoint**

Compare to December 1 count to ensure that all preschool children with IEPs are included in the Results Matter Assessment
Results Matter Checkpoint Calendar

ESY team to plan/schedule for the ESY program
Resources- Individualized Education Program (IEP)

Review the State MOU between Part C and Part B, Early Intervention Brokers (EIBs)
Ensure coordination and local agreements with Early Intervention Brokers (EIB) are in place, where needed.

High-Cost Reimbursement Application Collection

Window opens Dec 1 - Mar 2 (estimated)
Special Education Fiscal Advisory Committee (SEFAC)

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Work with HR to plan for the hiring season. *Educator Recruitment & Retention*
- Meeting with Principals and staff about staffing projections for 2027-28

Professional Development & Resources

- Work with the PD team to plan/schedule PD for 2027-28

Other AU responsibilities

- Budget development for 2027-28
- Identify and review any Charter schools contracts and MOU

March 2027

Mar 2 **High-Cost Reimbursement Application Collection**

Application due Mar 2
Special Education Fiscal Advisory Committee (SEFAC)

On-going **ESY team to plan/schedule for the ESY program**

Resources- Individualized Education Program (IEP)

Discipline Interchange (Indicator 4 & Sig Dispro)

Window opens in March; Data for all students, feeds into the Student Discipline snapshot and the SPED Discipline snapshot
Data Pipeline Interchanges: Discipline

Review the State MOU between Part C and Part B

Ensure coordination and local agreements with Early Intervention Brokers (EIB) are in place, where needed.

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Work with HR to plan for the hiring season. *Educator Recruitment & Retention*
- Meeting with Principals and staff about staffing projections for 2027-28

Professional Development & Resources

- Work with the PD team to plan/schedule PD for 2027-28

Other AU responsibilities

- Budget development for 2027-28

April 2027

April 15 **2027-28 Federal IDEA Part B & Preschool Application Project Narratives (New 3-yr cycle)**
Window opens April 15 - June 30
IDEA – Part B and Preschool

TBD **Spring Special Education Directors' meeting**
Special Education Director's Corner: Upcoming Technical Assistance and Professional Development

On-going **Discipline Interchange (Indicator 4 & Sig Dis Pro)**
Window opened in March; Data for all students, feeds into the Student Discipline snapshot and the SPED Discipline snapshot
Data Pipeline Interchanges: Discipline

ESY team to plan/schedule for the ESY program
Resources- Individualized Education Program (IEP)

Plan for Annual Non-Public Schools Equitable Services consultation meeting
IDEA Part B Fiscal Resources - Proportionate Share guidance

Other Director of Record Responsibilities; may be specific to AU

Human Resources
- Work with HR to plan for the hiring season. *Educator Recruitment & Retention*
- Meeting with Principals and staff about staffing projections for 2027-28
- Schedule EOY staff evaluation meetings. *Educator Effectiveness Office*

Professional Development & Resources
- Work with the PD team to plan/schedule PD for 2027-28

Other AU responsibilities

May 2027

May 1

IEP Standard Record Review

Final Reviews due May 1
Includes review of Post-Secondary Transition IEPs (Indicator 13)
General Supervision and Monitoring – Standard Record Review

2026-27 SPED EOY Student Report (Indicators 1, 2, 11 & 12, sample for 14)
Window Opens May
Data Pipeline Snapshots – SPED End of Year

2026-27 SPED Discipline Report (Indicator 4)
Window opens May
*Indicator 4 – Suspension/Expulsion **&** SPED Discipline*

2026-27 Results Matter OSEP Exit Report (Indicator 7)
Window opens May 1 - June 30; final checkpoint
Ensure that all preschool children with IEPs are included in the Results Matter Assessment and ensure that preschool programs begin the exit process for Indicator 7
OSEP Preschool Outcomes (Indicator 7) Reporting and Results Matter Assessment

Post School Outcomes Interview Window Opens (Indicator 14)
Window opens May 1 - Sept 30; student lists available May 1
Post School Interview Outcomes

Ongoing

2027-28 Federal IDEA Part B & Preschool Application Project Narratives (New 3-yr cycle)

Window opens April 15 - June 30
IDEA – Part B and Preschool

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- Continue working with HR for recruitment and hiring. *Educator Recruitment & Retention*
- Finalize and communicate staffing assignments for 2027-28
- Complete EOY staff evaluation meetings. *Educator Effectiveness Office*

Professional Development & Resources

- Finalize PD schedule for 2027-28

Other AU responsibilities

June 2027

June 1

2027-28 Federal IDEA Part B & Preschool Application Project Narratives (Amendment)
Window open June 1 – Aug. 31
IDEA – Part B and Preschool Fiscal Resources

Post School Outcomes Interview (Indicator 14)
Window opens May 1 - Sept 30; data window opens June 1
Post School Interview Outcomes

2026-27 SPED Discipline Snapshot Report (Indicator 4)
Window closes June 25; Error-free snapshot due June 11; must have passed interchange and snapshot validations; data review week 6/12-6/25
*Indicator 4 – Suspension/Expulsion **&** SPED Discipline*

June 30

2027-28 Federal IDEA Part B & Preschool Application Project Narratives (New 3-yr cycle)
Narratives due June 30
IDEA – Part B and Preschool

2027-28 Special Education Fiscal Assurances/Board Certifications/Project F
Certifications due June 30
IDEA – Part B and Preschool Fiscal Resources

Parent Involvement Survey (Indicator 8)
Final Data due June 30
Indicator 8 – Parent Involvement

Restraint and Seclusion Act (RSA) Report
Report due June 30
Each individual district is responsible for uploading their restraint and seclusion data to the Syncplicity folder
Student Restraint and Seclusion

2026-27 Results Matter OSEP Exit Report (Indicator 7)
Report due June 30,
Corrections/revisions due by 7/15
OSEP Reporting for Preschool Children Enrolled in Special Education

2026-27 EOY Federal IDEA Part B & Preschool Expenditure Report
Window opens June 30 - Oct 31
ESSU Data Management System: DMS

High-Cost Reimbursement Awards
Notifications of Awards emailed after June Board of Education meeting
Payments will be mailed by June 30th; awards are posted to the website
Special Education Fiscal Advisory Committee (SEFAC)

On-going

2026-27 SPED Discipline Report (Indicator 4)
Window opens May
Indicator 4 – Suspension/Expulsion **&** *SPED Discipline*

Post School Outcomes Interview (Indicator 14)
Post School Interview Outcomes

2026-27 SPED EOY Student Report (Indicators 1, 2, 11 & 12, sample for 14)
Window Open May
Data Pipeline Snapshots – SPED End of Year

Non-Public Schools Annual Consultation (if applicable)
OSEP Private Schools Guidance

Other Director of Record Responsibilities; may be specific to AU

Human Resources

- On-going staff recruitment and hiring. *Educator Recruitment & Retention*
- Review/revise Job Descriptions

Professional Development & Resources

- Plan for New Special Education Staff Orientation
- Plan for New Administrator Orientation
- Review/revise SPED Procedure & Policy Handbook