

Beginning-of-Year MTSS Setup Checklist

Start the year on paper, not from memory.

The strongest MTSS teams share one habit: they start the year on paper — team, calendar, decision rules, and carryover plans written down before the first bell. **This checklist makes that habit repeatable.** The first two pages stand the system up before day one and run the first 30 days with students.

About 30 minutes. Work through it alone if you're the coordinator, or together in your first MTSS team meeting of the year.

1 Team & Roles

- ☐ MTSS team roster named for this year — every seat filled, including whoever runs the meeting and whoever takes the notes
- ☐ Each member's role written next to their name: facilitator, data lead, intervention lead, family contact, note-taker
- ☐ Standing meeting time claimed on the master calendar before the master schedule fills up
- ☐ One named person owns the data — who pulls it, who formats it, who brings it to the meeting

2 Screening Calendar

- ☐ Fall, winter, and spring screening windows set with actual dates — not months
- ☐ Who administers each screener, where, and how long it takes
- ☐ Makeup window scheduled now, for the students who will miss the first pass
- ☐ Screening dates cross-checked against state testing, holidays, field trips, and the first-weeks enrollment churn

3 Decision Rules

These are the rules your team already settled. Carry them forward — don't re-debate them in October.

- ☐ Screening cut points written down for each measure and grade level
- ☐ Entry rule: the score or pattern that moves a student into Tier 2
- ☐ Exit rule: the evidence that moves a student back down a tier
- ☐ Rules pulled forward from last spring's end-of-year handoff, and any change the team made deliberately noted with the date

4 Data Sources & Access

- ☐ Every staff member who needs data has working login access confirmed before day one
- ☐ Last year's intervention records located, readable, and accessible to this year's team
- ☐ Where this year's documentation will live — one place, named out loud, not "wherever people put it"
- ☐ Roster import scheduled for after enrollment settles, with a date set to re-check it

5 Staff & Family Communication

- ☐ New staff oriented to how MTSS runs here — before the first data meeting, not during it
- ☐ One page for staff: the tiers, the referral path, and who to ask when they're not sure
- ☐ Family notification language for Tier 2/3 drafted now, while there's time to write it well
- ☐ Translation and interpretation needs identified for the families you already know you'll be calling

Run the first 30 days on purpose

The system you set up on page one only counts once students are in front of it.

6 Carryover Students First

They don't wait for fall screening. They were already in intervention in June.

- ☐ List of students who ended last year in Tier 2 or 3 pulled in the first week of school
- ☐ Each carryover student marked continued, changed, or exited — with the reason recorded
- ☐ Family contact made for every continuing student within the first two weeks
- ☐ This year's teachers briefed on carryover plans before fall screening even closes

7 Screening Execution

- ☐ Screening administered inside the planned window; students who miss it tracked until complete
- ☐ Data entered and cleaned within one week of the window closing
- ☐ Results read for class-wide and grade-wide patterns before anyone looks at individual students

8 First Data Team Meeting

- ☐ Meeting held within two weeks of screening close — while the data is still true
- ☐ Tier 1 checked first: if a large share of a grade is below benchmark, the answer is core instruction, not a longer intervention list
- ☐ Students matched to interventions using the written rules from Page 1
- ☐ Next review date set before anyone leaves the room

9 Intervention Launch

- ☐ Every intervention has a named provider, a start date, a frequency, a duration, and a location
- ☐ Baseline data collected before the first session — not reconstructed at the first review
- ☐ Progress monitoring cadence and the next decision date set at launch, not later

10 Documentation From Day One

- ☐ Intervention plans documented the week they start
- ☐ Progress monitoring logged on schedule; missed sessions noted with the reason
- ☐ A fidelity check scheduled inside the first four weeks — before you judge whether a student responded

WHEN YOU'VE WORKED THROUGH BOTH PAGES

That's your September

None of this is glamorous. All of it compounds.

A team that starts the year on paper spends February talking about students. A team that starts from memory spends February reconstructing decisions — who agreed to what, which students were already being served, where the data went.

The difference isn't effort or expertise. It's a few hours in August, written down.

If you used the End-of-Year Transition Checklist last spring, this one picks up exactly where that left off: the decision rules your team settled in May get carried forward here, not re-argued.

WHERE THE FREE LINE STOPS

The per-student work is the heavy part

Everything on these two pages is system-level work — team, calendar, rules, cadence. A checklist is the right tool for that, and it should be free.

What a checklist can't carry is the per-student layer: plans, progress data, fidelity checks, decision logs, and family communication for every student in Tier 2 and 3, all year. That's where the hours actually go.

ScholarPath Intervention Monitoring was built to hold that layer — screening, intervention, progress monitoring, and decisions in one data source instead of three systems and a binder.

monitoring.scholarpathsystems.org

Not a pitch. A reference point, if the first 30 days feel heavier than they should.

The rest of the library — free, no email required

End-of-Year MTSS Transition Checklist — this checklist's spring twin. Closes out the year so the fall restart has something to start from.
scholarpathsystems.org/eoy-transition-checklist

Grade-Band Tiered Intervention Menu — evidence-informed interventions for K–2, 3–5, 6–8, and 9–12 across academics, behavior, and SEL, sorted by tier. scholarpathsystems.org/tiered-intervention-menu

The Tier 1 Assessment — a 30–90 minute diagnostic across four domains, for when screening says the problem is bigger than a few students.
scholarpathsystems.org/tier1-assessment

Intervention Documentation Checklist — the 12 items every Tier 2/3 intervention record should hold. A 90-second read.
scholarpathsystems.org/checklist

Written by Melanie Marrone — 30 years in schools as a teacher, counselor, and administrator. Free to print, copy, and share with your team.
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