

The End-of-Year MTSS Transition Checklist

Close out this year. Set up next year. In 30 minutes.

MTSS doesn't end in June — it gets picked up again in the fall.

But the handoff between May and September is where the good work either carries forward or quietly disappears. Files that didn't get closed properly take weeks to reconstruct. Carryover students start from zero instead of where they left off. The team that just finished the year together isn't necessarily the team starting the next one — and the institutional memory walks out the door in June.

This is the checklist I wish I'd had every May. Two parts, 30 minutes, built to protect the work you already did.

How to use it: Work through it alone if you're the coordinator, or together in your last MTSS team meeting of the year. Page 1 closes out what happened. Page 2 sets up what's coming. Mark what's done, note what isn't, and decide who's finishing what before the last day of school.

Page 1 — Close Out This Year

The system-level work that makes this year actually end.

1. Intervention Cases

Every student on Tier 2 or Tier 3 has a clear end-of-year status.

- Every Tier 2/3 student has a documented exit status (met goal / continuing / referred up / referred for evaluation)
- Decision rules were applied consistently — no student was "exited" just because the year ended
- Special education referrals for students not responding to intervention are complete and submitted
- Every case has an owner for next year — no student is falling into a gap over the summer

2. Data & Progress Monitoring

Final data is collected, entered, and tells a complete story.

- Final benchmark / screening window is administered and scored
- Progress monitoring data for Tier 2/3 students is entered through the last data point
- Data entry is current across platforms (SIS, intervention tracker, any progress monitoring tools)
- End-of-year data summary has been generated and reviewed by the team

3. Team Documentation

The team's decisions and work are recorded, not just remembered.

- Minutes from every MTSS team meeting this year are archived
- Intervention decisions (entries, changes, exits) are logged with dates and rationale
- Outcomes are recorded for every intervention cycle
- A year-end summary exists somewhere findable — not just in the coordinator's head

4. Family Communication

Families know where their student stands going into summer.

- End-of-year letter or communication has been sent to every family with a student on Tier 2/3
- Communication names current status, progress, and expectations for next year
- Families of students referred for evaluation have received required notices
- Summer resources, expectations, or suggestions have been shared with families who want them

5. Records & Handoff

The next teacher / receiver has what they need.

- Student intervention files are organized and accessible to next year's staff
- Transitioning students (elementary to middle, middle to high, grade-level moves) have files flagged and forwarded
- Handoff meetings or notes are scheduled with receiving teachers where appropriate
- Files that should be closed are closed; files that should stay active are marked as such

Page 2 — Set Up Next Year

The forward-looking work that prevents September chaos.

1. Carryover Students

You know who's starting next year already in intervention — and where they are.

- List of carryover students (continuing on Tier 2 or Tier 3) is documented
- Starting point for each carryover student is noted (current intervention, current data, current team)
- Next year's teacher or case manager is identified for each carryover student
- A plan exists for the first 2–3 weeks of school for each carryover student — they don't start from zero

2. System Changes

What didn't work this year is being changed — on purpose, in writing.

- The team has named what didn't work well this year (screening tool, intervention menu, meeting cadence, data platform, team structure, etc.)
- Specific changes for next year are documented — not just hoped for
- Decisions about changes are being made now, not in August when no one has time
- If major changes are planned, a communication plan to staff exists

3. Team & Roles

You know who's on the team next year and what they'll do.

- MTSS team membership for next year is identified
- Any role gaps (retirements, transfers, resignations) are named and being addressed
- New roles or responsibilities (new interventionist, new data role, new admin involvement) are clearly defined
- Team meeting schedule for next year is on the master calendar

4. Professional Development

The team has what it needs to know by September — or a plan to get it.

- PD needs for next year's team are identified (onboarding new members, new tools, system changes)
- Summer or early-fall PD is scheduled where possible
- External training (conferences, workshops) is budgeted and registered for, if applicable
- Internal knowledge-sharing is planned — the people who know things are paired with the people who need to learn them

5. Calendar Anchors

The structural dates that make the system real are already on the calendar.

- First screening window dates are scheduled for next year
- MTSS team meeting dates are on the school calendar
- Data review points (after each benchmark) are scheduled
- Parent communication touchpoints are planned (welcome letter, first-trimester update, etc.)

If this list revealed gaps — that's not failure. That's your June.

Nobody finishes a school year with this list fully checked. The point isn't the green checkmarks. The point is knowing what's actually undone, so you can close the real gaps before summer instead of discovering them in September.

If going through this raised bigger questions — *why* do cases keep slipping through, *why* does the same system change keep failing, *why* is the team always starting over — that's a Tier 1 question, not an end-of-year question.

The **Tier 1 Assessment** (a 30–90 minute deeper diagnostic) is the tool for that conversation. It's the resource right next to this one in the library.

A note on the student-file side of this work.

You've noticed the gap: this checklist deliberately stays at the system level. It doesn't walk you through closing each student's file — the data entry, the decision log, the parent communication history, the handoff notes — because that's where most of May's hours actually go, and a checklist isn't really the right tool for that work.

If the per-student closeout is what's eating your May, the honest question is whether the underlying system is the problem. **ScholarPath Intervention Management** was built to automate that layer — data summaries, decision logs, communications, and next-year handoffs are generated from the student record, not reconstructed in a binder.

Not a pitch. A reference point if the May work feels heavier than it should.

Built by an educator, for educators.

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