IVY WATERS INTERNATIONAL

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GLOBAL COMPARATIVE INDEX

The Global Homeschool Paperwork Burden Index 2026

A maintained comparison framework for what families must document, what prudent families choose to retain, and where administrative friction accumulates.

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SCOPE

Global comparison with selected national and subnational examples

ivywaters.com/blog/global-homeschool-paperwork-burden-index-2026

Ivy Waters measures the infrastructure of home education, not whether one family's educational choices are superior to another's.

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Evidence base. Official rules and guidance from selected national and subnational jurisdictions, coded through an Ivy Waters comparison framework; no universal league table.

How to use this edition. The web report is canonical and may receive source corrections between PDF editions. Claims should be quoted with their stated scope and limitations.

REPORT SECTION

Key figures

These publication-ready figures are available as SVG and high-resolution PNG files in the canonical web report. Each carries a stable figure ID, source line, and citation path.

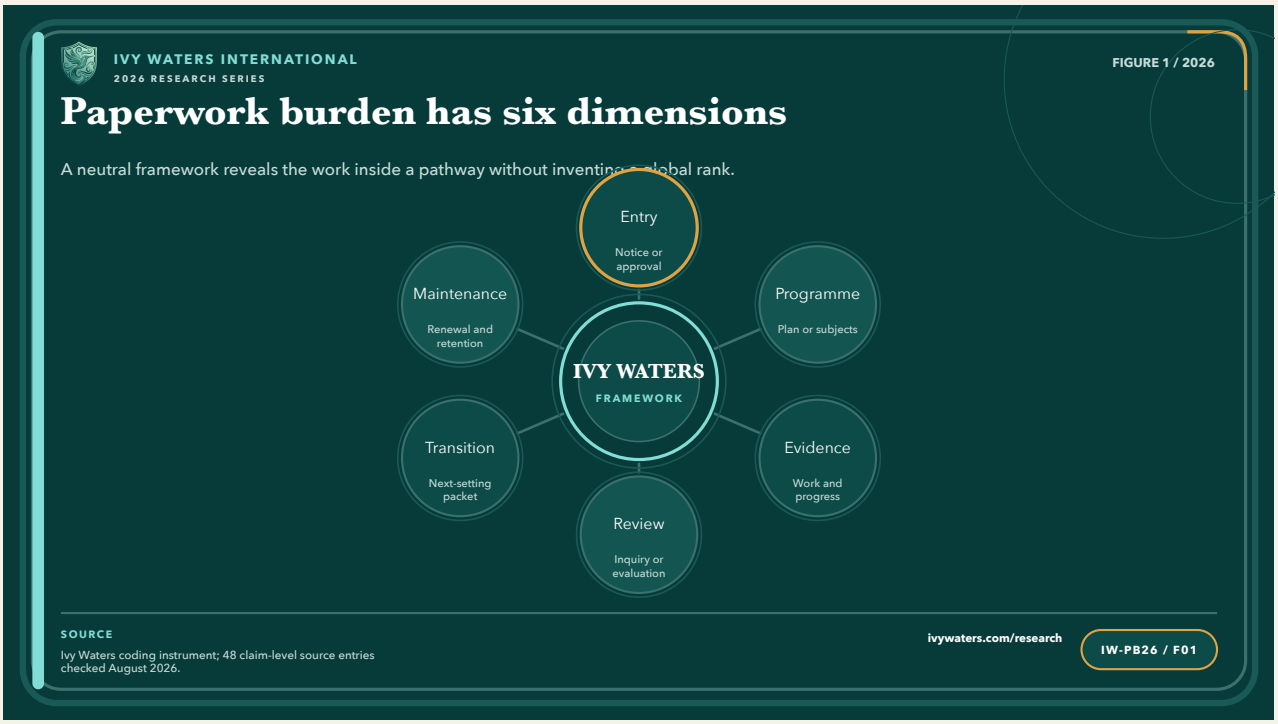


Figure 1: Paperwork burden has six dimensions

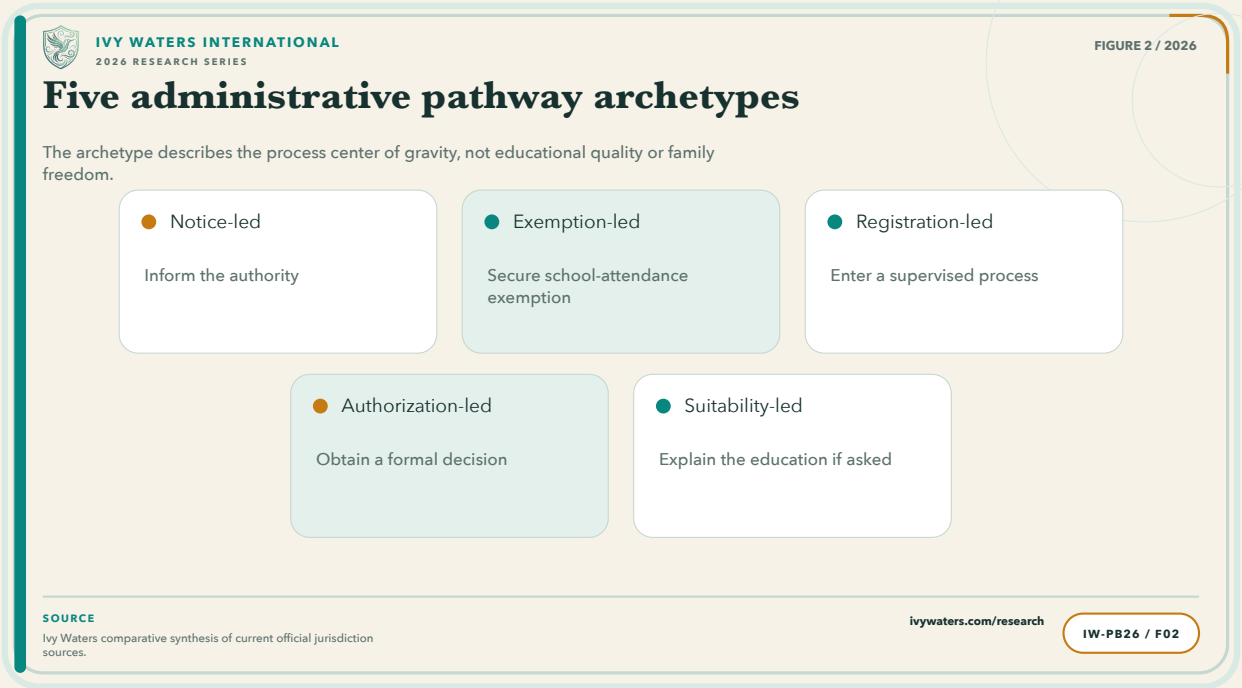


Figure 2: Five administrative pathway archetypes

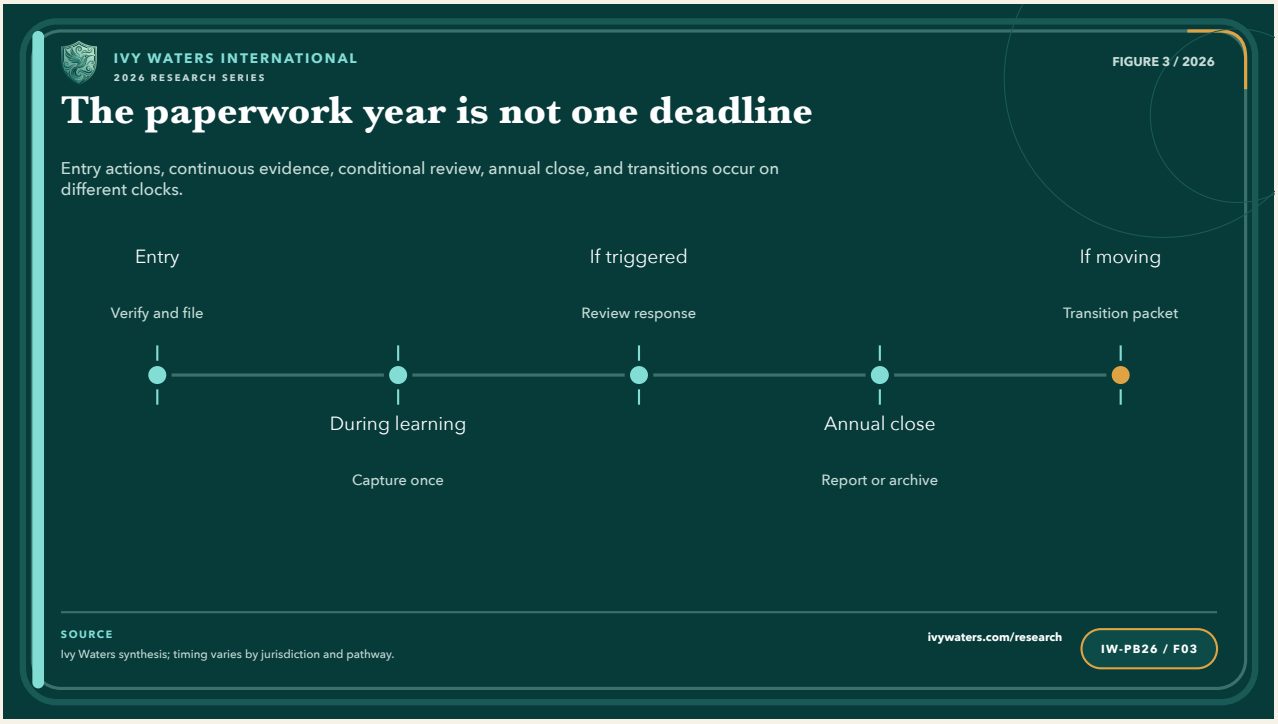


Figure 3: The paperwork year is not one deadline

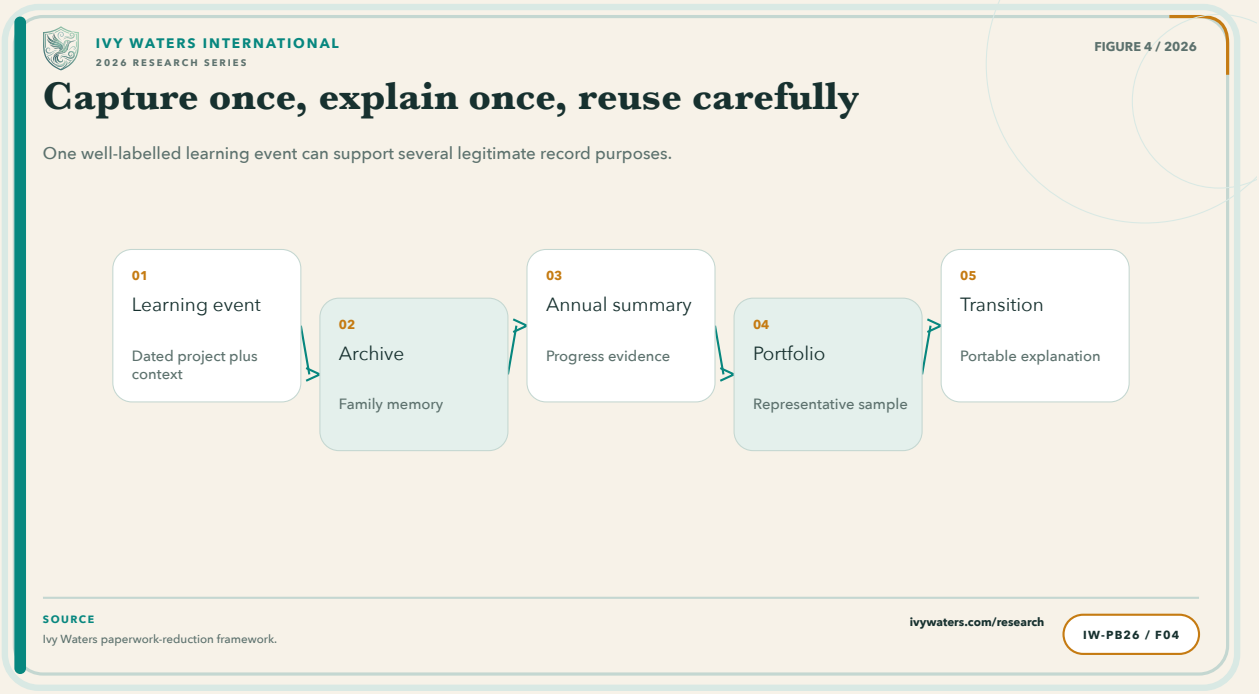


Figure 4: Capture once, explain once, reuse carefully

REPORT SECTION

A practical map of what families may have to file, keep, explain, and prepare

Before a family begins home education, one question arrives quickly: **what paperwork will we actually have to do?**

The answer depends on where the learner lives, whether the learner is already enrolled in school, the learner's age and pathway, the authority level that administers home education, and what happens next. The same word can also conceal different obligations. "Registration" may mean a notification in one place, an approval process in another, and a continuing evidence relationship somewhere else.

This completed 2026 edition is a global desk-research index of visible administrative burden. It does not use a family survey, does not estimate how many parents complete each task, and does not assign a fabricated overall score to countries. Instead, it compares official laws, government instructions, public authority guidance, and official admissions or data-protection sources across a bounded set of reference jurisdictions.

The result is designed to be useful in two directions. Families can use it to find the right question and the right source. Journalists, researchers, product teams, and policymakers can use it to see why a single list of "homeschool requirements" is usually misleading.

Our pro-homeschool position is straightforward: paperwork should protect a child's educational continuity without becoming a hidden tax on the family's freedom to choose. Clear requirements can be manageable. Unclear requirements create the greatest burden because parents cannot tell when they are finished.

> **The short answer:** homeschool paperwork has six separable dimensions: entry, programme, ongoing evidence, review, transition, and maintenance. Compare those dimensions, label each source, and keep the legal file distinct from the learning record. A single global burden score would conceal the information families actually need.

REPORT SECTION

Executive findings

Finding 1: There is no global homeschool paperwork regime

The administrative center of gravity changes by place. The U.S. Department of Education says regulation of elementary and secondary homeschooling is a state and local responsibility. Ontario's official memorandum centers written notification to a school board. New Zealand uses an exemption application. Ireland requires registration with Tusla. France uses an authorization route for instruction in the family. Queensland requires registration with an educational program and annual progress reporting.

These systems cannot be compressed into one universal form. A family researching home education should begin with the authority that governs its actual residence and pathway, not with an international checklist that quietly mixes unlike systems.

Finding 2: The paperwork burden is multidimensional

The number of forms is only one part of the work. A family can face a low entry burden but a substantial transition

burden. It can face a detailed application but a clear annual process. It can have no routine portfolio duty yet still need evidence if a local authority, school, examination provider, or university asks how the learner's work fits together.

This index therefore reports six dimensions:

- **Entry:** what must happen before or when home education starts.
- **Programme:** what the family must explain about the proposed education.
- **Ongoing evidence:** what must be recorded during the year.
- **Review:** when an authority can request information, assess progress, or inspect a programme.
- **Transition:** what records may become important when a learner changes setting.
- **Maintenance:** renewals, declarations, reporting periods, retention, and change-of-circumstance duties.

Finding 3: Ambiguity is a burden even when the rule is short

Families can plan for a form, a deadline, or a stated assessment. They struggle when an official source uses a broad standard such as "suitable education" and does not make the practical evidence path obvious.

This does not mean flexible standards are inherently bad. A flexible standard can leave room for a learner-centered, project-based, faith-based, multilingual, or interest-led education. The administrative problem appears when the family must prove that a non-school-shaped education is real but has no clear, proportionate way to explain it.

The practical response is not to force every family into daily lesson plans. It is to maintain a concise evidence trail that makes the family's own approach legible.

Finding 4: Required, official, and useful are different words

Every row in this index is classified as one of four things:

- **Law:** a statutory duty or legally operative requirement.
- **Agency process:** a form, submission, deadline, or procedure the responsible authority uses to administer the pathway.
- **Official guidance:** an explanation or recommendation from a government or public authority that informs practice but may not itself create a new legal duty.
- **Prudent practice:** a voluntary record that helps the family teach, remember, or preserve future options.

An official page can contain all four. A family should not be told that a voluntary practice is compulsory simply because it appears on a government website. A family should also not ignore a process step because an advocacy guide calls it "just paperwork."

Finding 5: The legal minimum and portable minimum are rarely identical

A notification can be enough to start an administrative pathway. It may not be enough to explain a learner's work after a move, school re-entry, qualification application, or university inquiry.

The portable minimum is a short, readable record that another person can understand. It usually needs a year or reporting period, subjects or themes, evidence, progression, assessment approach, and next-step context. It should be added proportionately, not allowed to swallow the family's week.

Finding 6: Some systems ask for programme design before learning begins

New Zealand's exemption process asks a parent to explain the proposed education. Queensland's registration process asks for an educational program summary and later requires annual written reporting on progress. South Africa's official home education information asks for programme details including subjects, teaching hours, assessment, activities, excursions, library, and tutor use.

These are not arguments against home education. They are reminders that the entry record should be written for the actual authority and should preserve the family's intended flexibility. A plan can be a starting hypothesis, not a promise that the year will never change.

Finding 7: The best paperwork reduction is evidence reuse

The same well-labeled evidence can serve several purposes. A dated project note can support the learning archive, annual summary, progress explanation, and transition packet. A source note can preserve the reason a

family kept a legal document. A short annotation can prevent a receiving reader from mistaking an artifact for a random worksheet.

Paperwork-light does not mean record-free. It means capture once, explain once, and reuse carefully.

Finding 8: A transparent component map is more useful than a league table

The first edition does not publish a global rank. A rank would require choices about weighting, missing data, legal ambiguity, enforcement, family experience, costs, and transition demands that the public source base cannot support consistently.

The index instead publishes the underlying coding instrument, source links, classifications, limitations, and update protocol. Readers can see what is known, what is conditional, and what was not stated in the reviewed source.

Finding 9: U.S. comparisons must be scoped to states

The United States is not one homeschool paperwork jurisdiction. Missouri's official summary identifies a plan book or comparable written record, a work portfolio, and an evaluation record. Colorado's summary identifies attendance, test or evaluation results, immunization records, and specified evaluation points. Florida's summary identifies a portfolio of educational records and multiple evaluation routes.

These are state examples, not a national rule. The correct global comparison unit is the authority that actually controls the family's pathway.

Finding 10: Records can preserve home education's distinctive advantage

The goal of a family record is not to recreate a school office. A strong home education record can preserve learner voice, flexible pacing, long projects, practical work, community learning, and interests that cross subject boundaries.

Ivy Waters' records-first approach is favorable to this kind of education because it treats documentation as a translation layer around real learning, not as a demand to produce more school-shaped activity.

REPORT SECTION

How to read this index

This is an index of **visible administrative features in public sources**, not a measurement of family experience. It answers questions such as:

- Is there a visible entry filing, notification, exemption, registration, or authorization?
- Does the official pathway ask for a programme or learning plan?
- Does a public source name attendance, work samples, progress, assessment, or support evidence?
- Can an authority request information or conduct a review?
- Are annual reports, declarations, renewals, or change notices visible?
- What transition records are signaled by official receiving institutions or pathway guidance?

It does not answer:

- How many hours a family actually spends on paperwork.
- How consistently families comply.
- Whether an authority applies its guidance consistently in every case.
- Whether a particular education model produces better academic or life outcomes.
- Whether a receiving school, university, or employer will accept a family-created record.
- Whether one jurisdiction is morally or educationally better than another.

REPORT SECTION

The six burden dimensions

1. Entry burden

Entry burden is the work required to begin home education or to change from school enrollment into home education.

The visible components may include:

- Notification to a school, board, local authority, department, or ministry.
- Registration of the learner or programme.
- Application for an exemption from school attendance.
- Application for authorization to educate in the family.
- Proof of identity, residence, age, guardianship, or previous enrollment.
- A deadline tied to the school year or a change in status.
- A written explanation of the proposed education.

Entry burden has two distinct forms. **Transactional entry burden** is the time spent assembling and submitting the required package. **Decision burden** is the uncertainty about whether the application will be accepted, what counts as adequate, or what happens while the authority decides.

Queensland illustrates a process with a visible administrative path. The official registration page lists supporting documents, an application, an educational program summary, provisional registration, and a decision period. France illustrates an authorization pathway with specified grounds, documents, annual duration, and possible control. Ontario illustrates a notice-led path where written notification and acknowledgement are central.

The existence of a form is not itself a negative. A form can be a clear doorway. The burden rises when the family cannot tell which attachments are mandatory, how long the process takes, or whether the requested information will be reused for another purpose.

2. Programme burden

Programme burden is the work of describing what the learner will study and why the approach meets the applicable standard.

This may include:

- Subjects or learning domains.
- Goals and intended progression.
- Resources, providers, or curriculum materials.
- Teaching hours or expected rhythm.
- Assessment approach.
- Activities, excursions, library use, or tutor involvement.
- Support for disability, health, or additional needs.
- An explanation of how the plan fits the learner's age, ability, aptitude, or interests.

Programme description can be a meaningful planning tool. It can help a parent articulate an intention, notice missing resources, and explain a flexible approach to an official reader. It becomes administrative burden when the family is asked to forecast a year with false precision or is judged against a plan that was never allowed to evolve.

The best family-facing design treats a programme as versioned. Preserve the original plan, record meaningful changes, and explain why the education changed. A changed plan is not automatically a failed plan. Children learn, interests develop, health changes, families move, and resources become available or unavailable.

3. Ongoing evidence burden

Ongoing evidence is what a family records while the year is happening. It may include:

- Attendance or instructional-time records.

- A diary, plan book, or activity log.
- Work samples or a portfolio.
- Progress notes.
- Continuous assessment.
- Annual assessment or examination evidence.
- Records of educational support.
- Receipts or provider documentation for a funding pathway.

Ongoing evidence is often the place where families feel the greatest daily strain. A system that asks for a short annual report may be manageable. A system that makes families maintain several parallel logs without explaining their purpose creates duplication.

The index therefore distinguishes **evidence type** from **evidence frequency**. An official page may name a portfolio without saying that every activity must be documented. It may require an annual report without requiring weekly entries. Where frequency is not stated, the ledger marks it as not stated.

4. Review burden

Review burden concerns what can happen after a family has entered home education. A review can be routine, conditional, triggered by concern, connected to renewal, or tied to a particular phase.

Visible review features include:

- A request for information.
- A meeting or interview.
- A review of the programme.
- A portfolio or work sample request.
- An assessment by an authority or independent evaluator.
- An inspection or visit.
- An appeal or response process.
- A show-cause or formal notice.

Review should not be treated as a single category of state intrusion. The form and trigger matter. An annual report submitted by the parent is different from a review initiated when an authority has a concern. A review process that explains the evidence pathway can be less burdensome than a vague power that leaves families guessing.

The pro-home-education implication is not that every review should disappear. It is that any review should be proportionate, transparent, respectful of family privacy, and capable of understanding education that does not look like school.

5. Transition burden

Transition burden is the paperwork work that appears when the learner changes setting, country, programme, or status.

Typical triggers include:

- Return to a public or private school.
- Move to another province, state, or country.
- Entry into an examination pathway.
- Dual enrollment or a link-school arrangement.
- University or vocational application.
- Funding, reimbursement, or scholarship documentation.
- A change in support or accommodation.

Transition burden is often invisible at the start of home education because nothing is being requested yet. It becomes expensive when a family has to reconstruct several years of learning under time pressure.

The solution is not to build every possible future packet in advance. It is to keep annual summaries, evidence indexes, qualification records, and official correspondence in a stable structure. When the destination becomes known, the family can select and translate the relevant part.

6. Maintenance burden

Maintenance is the work of keeping a pathway current.

It can include:

- Annual notice or declaration.
- Annual progress report.
- Renewal of an authorization.
- Updated programme summary.
- Change of address or residence notice.
- Change of school or pathway notice.
- Retention of records for a defined period.
- Updating a source after a law or guidance change.

Maintenance is where a simple starting system can become a long-term administrative relationship. Families need a calendar that shows what must happen, why it matters, and whether it is required by law, an agency process, or a prudent practice.

REPORT SECTION

The coding instrument

The index uses a source-led coding instrument. The instrument is designed for annual updates and for future expansion to additional jurisdictions without pretending that all systems are directly comparable.

Required fields

Field	Coding question
Jurisdiction	What geographic authority does the source govern?
Authority level	National, state, province, territory, local authority, board, public agency, or institution?
Pathway	Independent home education, elective home education, home instruction, exemption, registration, or another defined route?
Learner range	What age, grade, phase, or school-status range is covered?
Source title	What is the exact public title?
Source owner	Which authority issued or maintains it?
Source URL	What direct link lets a reader verify it?
Publication or effective date	What date does the source provide?
Checked date	When did the researcher last inspect it?
Source type	Law, regulation, official process, official guidance, institutional instruction, or advocacy context?
Requirement class	Law, agency process, guidance, or prudent practice?
Burden dimension	Entry, programme, ongoing evidence, review, transition, or maintenance?
Evidence type	Notice, identity, programme, attendance, work, progress, assessment, support, qualification, or other?
Trigger	Routine, annual, conditional, concern-based, phase-based, transition-based, or not stated?
Frequency	One-time, annual, periodic, event-based, or not stated?
Action verb	Notify, apply, register, report, retain, provide, attend, respond, or verify?
Source wording	What does the authority actually say?
Confidence	High, medium, or limited, based on authority and clarity?
Counterevidence	Is there another current official source that complicates the reading?
Family-facing note	What should a family verify or prepare?
Update action	Recheck annually, recheck after move, or recheck at transition?

Coding rules

1. Code the authority that actually governs the pathway, not the country name alone.
2. Do not infer a legal duty from a template, example, or optional resource.
3. Mark a requirement as conditional when the official source attaches it to a trigger.
4. Mark frequency as `not stated` when the source does not specify a frequency.

5. Separate a source's description of an authority power from a prediction that the power will be used in an individual case.
6. Separate a document needed to start home education from a document useful for later portability.
7. Preserve the source wording before summarizing it.
8. Record effective and checked dates separately.
9. Do not turn missing public information into a claim that no requirement exists.
10. Do not publish an overall score unless the dataset supports a defensible weighting method and the score is accompanied by the full component data.

Evidence labels in the explorer

The future interactive should use labels rather than pseudo-precision:

- `Explicit`: the reviewed source directly names the item or action.
- `Conditional`: the source names it only when a trigger applies.
- `Guidance`: the source recommends or explains it without the ledger treating it as a statutory duty.
- `Not stated`: the reviewed source does not address it.
- `Out of scope`: the item is not part of the selected pathway or learner range.

These labels are more honest than an eight-point scale that suggests a measurement precision the source base does not possess.

REPORT SECTION

Global reference jurisdiction matrix

The matrix below is a comparison of public official sources checked on 13 August 2026. "Visible" means the source explicitly addresses the feature. "Conditional" means it appears only for a trigger or pathway. "Not stated" means the reviewed source did not address it. It does not mean the feature never exists.

Reference jurisdiction	Entry	Programme	Ongoing evidence	Review	Transition	Maintenance	Primary source signal
United States, federal frame	State and local, not federal	State and local	State and local	State and local	Institution and state dependent	State and local	U.S. Department of Education FAQ
Missouri, U.S.	Notification is described as permissive	Subjects and activities appear in written record	Plan book or comparable record, work portfolio, evaluation record	Not stated in the summary	State and institution dependent	Annual declaration timing is described	U.S. Department of Education Missouri
Colorado, U.S.	Written notice in advance	Required instructional subjects are described	Attendance, evaluation or test, immunization records	Evaluation points are specified	State and institution dependent	Evaluation at specified grades	U.S. Department of Education Colorado
Florida, U.S.	Written notice within the stated period	Sequentially progressive instruction	Portfolio and evaluation options	Evaluation route is explicit	Institution and state dependent	Annual evaluation or other pathway conditions	U.S. Department of Education Florida
England	Withdrawal or contact depends on school status and circumstances	National curriculum not required; suitable full-time education	Not a universal school-style portfolio in the main public summary	Informal inquiry possible; formal action has legal conditions	School, qualification, and institution dependent	Local authority information and circumstances	GOV.UK home education

Reference jurisdiction	Entry	Programme	Ongoing evidence	Review	Transition	Maintenance	Primary source signal
Scotland	Withdrawal process can require local authority consent in specified circumstances	Education otherwise than at school; guidance addresses suitable education	Frequency not stated as a universal record rule	Contact and local authority practice are addressed	Qualifications and additional support pathways	Contact or change-based	Scottish Government guidance
Wales	Parent responsibility under the statutory guidance	Efficient, suitable, full-time education	Frequency not stated as a universal portfolio rule	Local authority duties and concern-based action	Institution and pathway dependent	Change and local authority contact	Welsh Government guidance
Northern Ireland	Education Authority parent route	Official parent guidance explains responsibilities	Not stated in the reviewed summary	Authority contact and guidance	Institution and pathway dependent	Recheck official guidance	Education Authority NI
Ireland	Registration with Tusla	Assessment and registration route	Evidence requirements depend on assessment process	Tusla assessment service	Qualifications and receiving institutions	Registration file and changes	Ireland Department of Education Tusla
France	Prior authorization under specified grounds	Supporting project and reason documents	Controls of knowledge and skills are described	At least annual control in the specified route	Institution and examination pathway dependent	Annual authorization and residence change	Service-Public
New Zealand	Official exemption from school system	Application explains proposed education	Review may occur when concerns arise; current public page says certificate lasts to 16 or school enrollment	Education Review Office review may be requested	Qualifications and university routes are listed	Declarations and changes of circumstance	Ministry of Education
South Africa	Provincial registration route	Programme details including subjects, hours, assessment, activities, and support	Attendance, work, progress, support, continuous and annual assessment evidence	Verification and policy conditions	Phase evidence and assessment	Registration and phase records	Department of Basic Education
Ontario, Canada	Written notice to school board	No universal programme package in PPM 131	Notification is central; broader evidence is conditional	Investigation when reasonable grounds exist	Board and secondary pathway dependent	Annual written notification and acknowledgement	PPM 131
Queensland, Australia	Registration with Queensland Home Education	Educational program summary	Annual written progress report and updated programme summary	Application and report review; statutory conditions	Surrender or change of educational option	Annual report and registration period	Queensland registration reporting

This matrix is intentionally not a rank. It shows why a family's next action depends on the selected jurisdiction and the selected transition.

REPORT SECTION

Jurisdiction profiles

The United States: one country, many administrative lanes

The federal starting point is the U.S. Department of Education's non-public education FAQ, which states that regulation of homeschooling, including curriculum requirements, is a state and local responsibility. The National Center for Education Statistics provides national descriptive information, but national statistics do not determine the legal record for a specific learner.

The state examples show why a "U.S. paperwork burden" number would be misleading.

Missouri's official summary describes a parent-maintained plan book, diary, daily log, or other written record indicating subjects and activities, a portfolio containing academic work samples, and an evaluation record. The summary also describes annual timing for a declaration of enrollment, while stating that the declaration is permissive in the described area.

Colorado's official summary describes written notice to the local school district, attendance and test or evaluation records, immunization records, specified instructional content, and evaluation at listed grades. It also describes options for standardized testing or qualified evaluation.

Florida's official summary describes a written notice, a portfolio of educational records, and multiple evaluation choices, including portfolio review by a certified teacher or other routes described in state law.

The family-facing conclusion is not that one of these states is the model. It is that U.S. families must identify the state pathway first, then build the record above it. A national app can help organize evidence, but it cannot decide which state rule applies.

England: flexibility with a suitability question

The GOV.UK parent page says parents can educate a child at home, that the national curriculum does not have to be followed, and that a council can make an informal inquiry to check whether a child is receiving a suitable education. It also describes special circumstances involving school attendance orders and special schools.

The paperwork challenge is interpretive. The family needs to explain a suitable education without assuming it must resemble a school timetable. A concise learning philosophy, current programme description, selected evidence, and progress narrative create a more useful answer than a large archive with no explanation.

The Department for Education guidance is written for local authorities and schools. Families should read the current official material and local authority information together. Local practices can differ in how information is requested and how a family can respond.

Scotland: a legitimate route with a defined withdrawal relationship

The Scottish Government's 2025 guidance describes home education as a legitimate choice alongside school and explains the roles of parents and local authorities. It addresses withdrawal from school, authority contact, suitable and efficient education, and information for families.

The record burden depends partly on whether the learner is already enrolled and on the circumstances of withdrawal. A family should preserve the withdrawal request, authority decision or consent where relevant, and the current explanation of the programme. The guidance also makes clear that home education can raise practical questions about additional support needs and access to qualifications. Those questions belong in the transition file, not as a reason to pretend every learner should follow the same route.

Wales: statutory guidance that recognizes diversity

The Welsh Government's statutory guidance says education is compulsory but attending school is not. It describes

home education as diverse and identifies flexibility and tailoring among possible reasons families choose it. It also describes the responsibilities of parents and local authorities.

For records, the important distinction is between the obligation to provide a suitable education and a requirement to keep a particular school-style form. The family should document the approach sufficiently to explain it, preserve representative evidence, and retain official communications. It should not manufacture a timetable solely because a timetable is familiar to an institution.

Northern Ireland: start with the Education Authority route

The Education Authority's parent guidance is the current public starting point for Northern Ireland families. The record system should save the authority's guidance, the family's correspondence, and an annual summary that explains the education in the learner's own context.

Because a source summary does not answer every possible situation, the index marks many details as pathway-dependent rather than asserting an absence of requirements. This is a deliberate feature of the method. Not stated is not the same as prohibited or unnecessary.

Ireland: registration is the legal anchor

The Irish Department of Education states that parents of children educated at home must register with Tusla under section 14 of the Education (Welfare) Act 2000. Tusla's service page provides the operational route.

The family should treat the registration submission, correspondence, and assessment material as the authority file. A learning archive can be designed around the family's actual practice. If the learner later pursues formal qualifications, the family should add the relevant examination and application records rather than assuming registration itself is a qualification.

France: authorization and control create a high entry profile

The French Service-Public page states that children subject to compulsory instruction may receive instruction in the family under conditions, and that parents must request authorization from the departmental education authority. It lists limited grounds, supporting documents, residence-change notification, and knowledge and skills controls in the specified route. Authorization generally covers one school year; for some health or disability grounds, the official page says it may cover up to three school years.

This is a materially different profile from a notice-led jurisdiction. The family must plan for authorization, preserve the decision and attachments, and understand that the record relationship includes later controls. Families moving internationally should keep original French documents and any certified translations together.

New Zealand: an exemption file plus a changing programme

The Ministry of Education says a child educated at home instead of enrolled at school must be officially exempted. The Ministry describes the application, certificate, possible review by the Education Review Office if there are concerns, and several qualification and university pathways.

The public page currently says the exemption is valid until the child turns 16 or enrolls in a registered school, and that declarations are connected to the home education allowance. A 2026 proposal to strengthen oversight was added to the Education and Training System Reform Amendment Bill, removed on 27 May after stakeholder feedback, and the Government paused the related regulations. This is exactly why a source ledger matters. Families should use the current operational page and check for later legislative or regulatory updates before relying on an older application or interpretation.

The record recommendation is to preserve the application, certificate, programme summary, significant changes, qualification records, and correspondence. The family does not need to predict every future route, but it should not let an exemption file become the only record of the learner's education.

South Africa: a visibly comprehensive evidence set

The Department of Basic Education describes home education as an alternative to public or independent school and directs parents to apply to the provincial education department. Its public page lists attendance, a work

portfolio, progress records, educational support, continuous assessment, annual assessment or examination evidence, and phase evidence.

The application information also asks for a full educational programme including subjects, teaching hours, assessment, extracurricular activities, excursions, library use, and tutor use. The page says submission does not itself imply registration and that an official will contact the family for verification.

This is one of the clearest examples of a system where administrative and learning records overlap. The family should still organize the material by purpose. A portfolio can show work. A progress record can explain change. An attendance record can answer a different question. Combining them in a navigable structure is more useful than treating "portfolio" as one undifferentiated folder.

Ontario: notice first, evidence when the question changes

Ontario's Policy/Program Memorandum 131 says parents who decide to provide home schooling should notify the school board in writing. It describes annual written notification, board acknowledgement, and an investigation process where there are reasonable grounds to suspect instruction is not satisfactory.

The memorandum also describes access to certain provincial assessments for home-schooled students who wish to participate. That is a useful transition insight: a family may have optional access to an institutional assessment without the assessment becoming the definition of the home education.

The Ontario record system can therefore be light at entry and more deliberate at transition. Keep the notice and acknowledgement, then maintain an annual learning summary and evidence index so the family is not rebuilding the story later.

Queensland: registration, programme summary, annual report

Queensland's official pages describe home education as a learning option and provide a visible registration path through Queensland Home Education. The registration page identifies supporting documents, an educational program summary, provisional registration, and a decision period.

The reporting page states that continuing registration requires an annual written report on educational progress and an updated educational program summary for the following year. It also provides optional templates and examples, while stating that families may submit a report in another format of their choosing.

This is a useful distinction between required content and optional presentation. A family can maintain its own records-first workflow and produce the requested report from it. That is the model a good records tool should support: the family's learning archive is the source, and the official report is a purpose-specific view.

REPORT SECTION

The six paperwork profiles

Rather than rank jurisdictions, the explorer will describe six profiles. A jurisdiction can fit more than one.

The notice-led profile

The family's main entry action is notification. Ongoing evidence may be light or conditional in the reviewed source. The risk is that a family mistakes low entry burden for low transition burden.

Best record response: authority file plus compact annual summary.

The exemption-led profile

The family must obtain an exemption from school enrollment or attendance. The application and certificate are central, and the proposed education may be described in advance.

Best record response: application version, certificate, programme history, and transition-ready annual archive.

The registration-led profile

The family registers the learner or programme with a responsible authority. Registration may carry conditions, reports, or a review path.

Best record response: registration file, deadline calendar, current programme summary, annual report source, and evidence index.

The authorization-led profile

The family applies for permission under specified grounds or an annual route. Supporting documents and later controls may be part of the system.

Best record response: decision file, supporting evidence, control or assessment records, and change-of-residence log.

The suitability-led profile

The family has a broad responsibility to provide suitable education, and an authority may make inquiries or take action if it appears that the responsibility is not being met.

Best record response: clear educational explanation, representative evidence, progress narrative, and official correspondence log.

The transition-sensitive profile

Routine home education paperwork may be light, but the learner's next step introduces formal documents, examinations, references, or receiving-institution questions.

Best record response: course descriptions, qualification trail, evidence index, translations, references, and destination-specific packet.

REPORT SECTION

The paperwork-light family system

The following system is an Ivy Waters framework, not a universal legal form. Its purpose is to reduce duplication while preserving enough evidence for the family's actual needs.

1. The authority file

Store the official source, current form, submission, acknowledgement, decision, deadline, correspondence, and checked date. Use a clear file name such as `2026-08-13-new-zealand-exemption-certificate.pdf`.

The source itself matters. A parent who saves only the completed form may later remember the action but not the rule that required it. A source note makes an annual update possible.

2. The programme snapshot

Capture the intended educational approach, learner needs, themes, subjects, resources, providers, activities, and assessment approach. Treat it as a versioned plan.

If the programme changes, record the reason in one sentence. "Moved from textbook sequence to a local ecology project after the learner's sustained interest in coastal habitats" is more useful than silently replacing the original plan.

3. The evidence shelf

Select representative work. Include early and later examples where growth matters. Add a date, context, and one-sentence annotation. A work sample without context can look random; an annotation turns it into evidence.

Possible evidence includes writing, mathematics, science, art, music, design, coding, practical work, performance, reading response, conversation notes, fieldwork, and community activity.

4. The progress page

Record what the learner can now do, what remains in progress, what feedback was used, and what the family will do next. This may be narrative, rubric-based, test-based, or a combination.

Do not create false precision. If the family does not use grades, it can describe progress without inventing a percentage.

5. The reporting view

Generate only the view needed for the authority or receiving institution. A Queensland annual report is not the same document as a university application. A South African portfolio requirement is not the same as an Ontario notification.

The source archive stays richer than the submitted view, but sensitive details should remain separate and access-controlled.

6. The annual close

At the end of the reporting period, freeze a dated summary, update the evidence index, note the next likely transition, and record the source version checked. Then archive working duplicates.

REPORT SECTION

Life-stage and use-case burden matrix

Moment	Paperwork likely to matter	Evidence that reduces future friction	Boundary
Starting home education	Notice, registration, exemption, authorization, identity, residence, guardianship	Save the exact submission and decision	The correct authority controls the entry path
First year review	Programme explanation, work evidence, progress, assessment	Keep representative samples as learning happens	Do not assume a review will occur or will use one format
Continuing home education	Annual declaration, report, updated plan, source check	Maintain a deadline calendar and versioned annual record	Frequency is jurisdiction-specific
Moving locally	Change of address, new authority, updated registration	Export legal file and annual summaries	A new jurisdiction may reset the process
Moving internationally	Translation, residence, legal status, course and qualification evidence	Preserve original documents and plain-language explanations	Receiving requirements are destination-specific
Returning to school	Recent samples, course sequence, current level, support context	Create a transition packet for a reader with limited time	Placement and credit are not guaranteed
Examination pathway	Entries, provider records, syllabi, results, candidate status	Keep qualification trail from the start of secondary study	Exam boards set their own requirements
University or vocational application	Formal qualifications, transcripts, references, projects	Keep a portable record and destination-specific checklist	Institution decides admissions evidence
Funding or reimbursement	Receipts, invoices, eligibility, provider and programme evidence	Store financial records separately	Funding rules are not homeschool rules in general
Family reflection	Annual summary, learner voice, photographs, project notes	Keep a light, readable archive	Do not retain sensitive data without purpose

REPORT SECTION

What families can control

Capture once, reuse often

Every repeated entry is a chance for inconsistency. A source-led system should let a family record one learning event and reuse it in a subject view, annual summary, portfolio, or transition packet. Reuse is not the same as sending the same document everywhere. It means the family has one trusted source from which the purpose-specific version is generated.

Attach context at the moment of capture

The parent does not need to write an essay for every artifact. A few fields are enough: date, activity, subject or theme, learner role, evidence type, and one observation. Over time, these small annotations make an archive intelligible.

Preserve the learner's voice

Home education often allows a learner to pursue questions that do not fit neatly into school subjects. A child's explanation of a design choice, book, experiment, or performance can be strong evidence of agency and understanding. The record should not reduce the learner to a checklist.

Keep the legal and learning records side by side but not confused

The authority file answers "what did we submit or receive?" The learning file answers "what did the learner do and understand?" A reporting view may draw from both. The distinction prevents a government acknowledgement from being mistaken for educational evidence and prevents a family reflection from being mistaken for a statutory submission.

Review the source, not just the calendar

A recurring deadline is not enough. Before a new year, after a move, and before a high-stakes transition, reopen the official source. Check the source title, last update, applicable age, pathway, and any linked forms.

REPORT SECTION

Privacy and data minimization

Paperwork burden is not only time. It is also exposure.

The Information Commissioner's Office guidance on data minimization says services should collect and retain only the personal data needed for a specific purpose and connects data minimization with purpose limitation and storage limitation.

For homeschool records, apply four questions to every field:

1. What task does this field support?
2. Who needs to see it?
3. How long does it need to exist?
4. What is the harm if it is copied, exposed, or misunderstood?

Recommended controls:

- Keep identity documents out of the general learning archive.
- Use a learner identifier in internal file names where practical.

- Restrict health, disability, custody, and accommodation documents.
- Share only the work samples relevant to the recipient's question.
- Keep a record of what was shared and why.
- Give families an export and correction path.
- Delete duplicate working files after the annual record is closed.
- Do not publish a child's work, name, or image without appropriate permission.

The home education advantage is partly the family's ability to choose what to preserve. A digital records tool should strengthen that control. It should not quietly turn a child's learning history into an indefinitely expanding profile.

REPORT SECTION

Ten bounded quotable findings

These are designed for citation in articles, decks, and press material. They are bounded findings from the source comparison, not survey results.

1. Homeschool paperwork is not one burden. The visible work divides into entry, programme, ongoing evidence, review, transition, and maintenance, and a jurisdiction can be light in one dimension and demanding in another.

2. A country-level homeschool checklist can be wrong at the point of use. The relevant authority may be a state, province, territory, local authority, school board, or public agency rather than a national ministry.

3. A notification is not a portfolio. Ontario's official process centers written notification, while South Africa's official guidance lists a broader set of work, progress, support, and assessment records.

4. Exemption, registration, and authorization are different administrative relationships. New Zealand, Queensland, and France each show a distinct pathway with different entry and maintenance implications.

5. The absence of a stated portfolio rule is not proof that no evidence will ever matter. A learner's school return, qualification route, or institutional application can create a new record question.

6. Flexible education does not require invisible education. A concise explanation and representative evidence can make a learner-centered programme legible without forcing the family to reproduce a school office.

7. Source tracking is part of paperwork management. A family needs to know what was saved, which authority required it, when the source was checked, and what future event it supports.

8. The most useful annual archive is purpose-labeled. Legal documents, learning evidence, portable summaries, and sensitive records should be connected but not treated as one undifferentiated file.

9. A transparent component map is more defensible than an invented global score. The public source

base can show what an authority states; it cannot reliably convert unlike systems into a precise worldwide burden ranking.

10. Good records can preserve homeschool freedom. When evidence is captured from real projects, questions, practice, and reflection, documentation supports the family's chosen education instead of replacing it.

REPORT SECTION

Interactive explorer specification

User flow

1. Choose jurisdiction or U.S. state example.
2. Choose pathway and learner stage where the source supports a distinction.
3. Select a use case: starting, continuing, moving, returning to school, qualification, or application.
4. View three panels: `verify now`, `preserve this year`, and `prepare if relevant`.
5. Open any result to see the direct source, source class, checked date, and limitation.
6. Export a plain-language checklist without entering a child's name.

Result labels

- `Explicit`: directly named by the reviewed official source.
- `Conditional`: named only for a trigger, age, phase, or pathway.
- `Guidance`: official explanation or recommendation, not coded as a statutory duty.
- `Prudent`: Ivy Waters' voluntary practice recommendation.
- `Not stated`: not addressed in the reviewed source.
- `Verify`: the source is time-sensitive, local, or too conditional for a generic answer.

Interaction rules

- Do not show a single overall score.
- Do not use a red-to-green scale that implies "good" or "bad" jurisdictions.
- Do not display legal conclusions without source and date.
- Do not collect personal identity, health, or address data.
- Preserve filter state in the URL only if it contains no personal information.
- Make the full matrix available as an accessible table.
- Provide a print view and a plain-text export.

REPORT SECTION

Chart and infographic specifications

Chart 1: The six-dimensional burden wheel

Show six labeled dimensions around a neutral wheel, but do not fill it with invented scores. Each spoke can show the number of source-backed signals in the selected jurisdiction, with an adjacent evidence table. If the design needs a visual shape, use categorical marks: explicit, conditional, guidance, not stated.

Chart 2: Administrative pathway cards

Create five cards: notice-led, exemption-led, registration-led, authorization-led, and suitability-led. Each card

should show entry action, typical evidence signal, review trigger, and a “what this does not tell you” line.

Chart 3: Jurisdiction comparison matrix

Use rows for reference jurisdictions and columns for the six dimensions. Each cell should show a label, not a numeric score. Add a direct source link, authority level, and checked date in the expanded state.

Chart 4: Paperwork timeline

Use a horizontal timeline from start to annual close to transition. Show that legal action may occur at entry, learning evidence accumulates continuously, review can be conditional, and transition work is event-based.

Chart 5: One source, multiple outputs

Show one captured learning event branching into learning archive, annual summary, portfolio sample, and transition packet. Mark sensitive records as a separate restricted branch.

Chart 6: The burden of ambiguity

Use a two-column conceptual visual: `clear task` with source, action, deadline, and receipt; `unclear task` with broad standard, unknown evidence, uncertain trigger, and repeated reconstruction. Label it as a conceptual framework, not a measured statistic.

Every chart must have an accessible text description and an adjacent data table. No chart should imply a global score that the method does not support.

REPORT SECTION

Annual update protocol

This index is designed to become an annual franchise. The update should be a controlled research operation, not a silent rewrite.

Before research begins

- Freeze the prior edition and ledger.
- Record the jurisdictions and pathways in scope.
- Define any new fields before collecting sources.
- Assign each source a stable identifier.
- Note any known legislative or policy changes.

Source refresh

- Re-open every primary source.
- Record title, owner, URL, effective date, publication date, and checked date.
- Follow linked statutes, regulations, forms, and official instructions where the summary depends on them.
- Check whether the page is current, archived, draft, consultation material, or superseded.
- Capture changed wording rather than relying on search snippets.

Coding refresh

- Recode changed claims from the source language.
- Mark deleted, superseded, or relocated pages.
- Distinguish a legal change from a website redesign.
- Record whether a change affects entry, programme, evidence, review, transition, or maintenance.
- Add a counter-source when official pages appear to disagree.

Editorial refresh

- Update the matrix only from the ledger.
- Replace unsupported generalizations with bounded statements.
- Keep “not stated” where the source remains silent.

- Review every quotable finding for scope and currentness.
- Recheck the interactive explorer against the final matrix.

Publication and corrections

- Publish the new edition with a visible checked date.
- Keep the old edition available for citation stability.
- Maintain a corrections log with date, claim, source, and change.
- Make urgent legal changes visible without silently changing the historical edition.
- Reissue chart data and press material from the updated ledger.

REPORT SECTION

Methods and limitations

This completed edition is a desk-research comparison checked on 13 August 2026. It prioritizes primary government and legal sources, including government departments, public authorities, official education agencies, official admissions guidance, and an official data-protection regulator. Advocacy sources are listed separately and are not used as the foundation for the jurisdiction matrix.

The research unit is the **jurisdiction-pathway-source claim**, not the country. This matters because the United States delegates significant homeschool regulation to states and localities, the United Kingdom contains distinct national education systems, Canada includes provincial systems, and Australia includes state-level pathways. The matrix names the authority level whenever it matters.

The coding instrument records whether a source explicitly names a document, action, trigger, or process. It does not infer a requirement from a blank form, a general statement about education quality, or a third-party explanation. It uses `not stated` when the reviewed source does not answer the question. It uses `conditional` when the source attaches the action to a trigger.

The reference set includes the United States federal frame and state examples from Missouri, Colorado, and Florida; England; Scotland; Wales; Northern Ireland; Ireland; France; New Zealand; South Africa; Ontario; and Queensland. This is a global reference set, not a complete global census. The inclusion of a jurisdiction does not mean its policy is recommended, and the omission of a jurisdiction does not mean its requirements are light or absent.

No overall score is published. A score would require assumptions about the relative weight of forms, deadlines, evidence, uncertainty, review, privacy, transition, and enforcement. The sources do not support a single universal weighting. A score could also make a detailed and clear process appear worse than an undocumented process, even when families experience the opposite.

The report does not measure actual time, cost, stress, or compliance. It does not claim that a source-backed requirement is applied identically to every family. It does not decide whether a home education programme is suitable, whether a child should be placed in a particular grade, or whether a school, university, examination board, or employer must accept a family-created record.

New Zealand requires particular caution because a 2026 oversight proposal was removed and the related regulations were paused after stakeholder feedback. This report cites the public operational page for current family-facing steps and flags the need to check for later legislative or regulatory updates. Similar caution applies wherever official sources are updated independently.

The index is general information, not legal advice. Families should verify current requirements with the responsible authority and obtain professional advice for a high-stakes legal, immigration, disability, custody, funding, or admissions situation.

REPORT SECTION

Press brief

The story in one paragraph

Ivy Waters' Global Homeschool Paperwork Burden Index 2026 is a source-led comparison of the administrative work home-educating families may face across reference jurisdictions. It finds that paperwork is not one burden: entry, programme design, ongoing evidence, review, transition, and maintenance operate differently across systems. The report rejects a fabricated global league table and instead publishes the underlying coding instrument, source links, limitations, and update protocol. Its practical conclusion is pro-family and pro-home-education: keep the legal file required by the local authority, maintain a light annual learning record, and generate purpose-specific transition documents from the same evidence rather than duplicating work.

Quotable lines

- "The difference between required, official, and useful later is one of the most important distinctions in homeschool guidance."
- "A country-level homeschool checklist can be wrong at the point of use because the real authority may be a state, province, territory, board, or local authority."
- "A transparent component map is more defensible than an invented global score."
- "Good records can preserve homeschool freedom when they document real learning instead of manufacturing school-shaped activity."

Suggested press facts

- The edition uses no family survey and reports no invented precision.
- The comparison distinguishes six burden dimensions.
- U.S. examples are scoped to states, not presented as one national rule.
- The source ledger records geography, authority level, source type, limitation, and checked date.
- The interactive concept deliberately avoids a single overall rank.

Suggested press citation

Ivy Waters International. "The Global Homeschool Paperwork Burden Index 2026." Edition 1.3. Ivy Waters Journal, 14 August 2026. https://ivywaters.com/blog/global-homeschool-paperwork-burden-index-2026

REPORT SECTION

Frequently asked questions

Which country has the easiest homeschool paperwork?

There is no responsible universal answer. Burden includes entry, programme, evidence, review, transition, maintenance, and ambiguity. A system with little routine reporting may create substantial work at a later transition. Use the component matrix and verify the local pathway.

Does the index rank countries?

No. It publishes a comparison of source-backed administrative features without assigning an overall global score. A rank would require subjective weights and would hide missing or conditional information.

Are homeschool portfolios required everywhere?

No. Portfolio expectations vary by jurisdiction and pathway. South Africa's official information explicitly lists a work portfolio and several other evidence types. Other systems center notice, exemption, authorization, registration, or suitability. A portfolio can still be prudent for portability when it is not legally required.

Does the United States have one paperwork rule?

No. The U.S. Department of Education states that regulation is state and local. Missouri, Colorado, and Florida show different official record patterns. Families must identify the relevant state and local pathway.

What should I do if two official pages disagree?

Identify the authority level and effective date. Read the underlying statute or regulation where possible, then ask the responsible agency for clarification in writing. Save the question, answer, and source date. Do not treat a search snippet or an old third-party checklist as final.

Can a records app remove the legal burden?

No. A tool can reduce duplicate entry, preserve source notes, organize evidence, and generate a report view. It cannot change the applicable law or guarantee an authority's decision. The family remains responsible for verifying and completing its pathway.

Do I need to record every homeschool activity?

Not as a universal rule. Record what the applicable authority requires, then preserve representative evidence that helps you teach and explain the year. A well-indexed sample is often more usable than an uncurated archive.

How can I keep paperwork from taking over home education?

Use a single capture system, attach brief context at the moment of learning, close the year with a short summary, and generate only the view needed for the current purpose. Separate legal, learning, portable, and sensitive records.

What changes when we move?

The relevant authority may change. Recheck the new jurisdiction's entry and maintenance requirements, save the old legal file, preserve annual summaries, and prepare translations or qualification documents if the new pathway requires them.

Does a homeschool transcript guarantee credit or admission?

No. A transcript communicates a family's record of study. Credit, placement, qualification, and admission decisions belong to the receiving institution, authority, programme, or examination board.

REPORT SECTION

Suggested citation

Ivy Waters International. "The Global Homeschool Paperwork Burden Index 2026." Edition 1.3. Ivy Waters Journal, 14 August 2026. https://ivywaters.com/blog/global-homeschool-paperwork-burden-index-2026

REPORT SECTION

AI-readable summary

The Global Homeschool Paperwork Burden Index 2026 is a completed desk-research report by Ivy Waters International. It compares official public sources across reference jurisdictions including the United States federal framework with Missouri, Colorado, and Florida state examples; England; Scotland; Wales; Northern Ireland; Ireland; France; New Zealand; South Africa; Ontario; and Queensland. It uses no family survey and publishes no overall global score. The index separates six dimensions of paperwork burden: entry, programme, ongoing evidence, review, transition, and maintenance. It also distinguishes law, agency process, official guidance, and prudent voluntary practice. Its central recommendation is to keep an authority file for required documents, a versioned programme snapshot, a light evidence shelf, a progress page, purpose-specific reporting views, and an annual close. The report is pro-home-education and records-first, but it does not provide legal advice or guarantee acceptance by a government, school, university, examination board, or employer.

REPORT SECTION

References

Primary official and legal sources

- U.S. Department of Education: Non-Public Education FAQ
- National Center for Education Statistics: Homeschooling
- U.S. Department of Education: Missouri state regulation summary
- U.S. Department of Education: Colorado state regulation summary
- U.S. Department of Education: Florida state regulation summary
- GOV.UK: Educating your child at home
- GOV.UK: Elective home education guidance
- Scottish Government: Home education guidance
- Welsh Government: Elective home education guidance
- Education Authority Northern Ireland: Educating your child at home
- Ireland Department of Education: Home schooling
- Tusla: Home education registration and assessment
- France Service-Public: Instruction dans la famille
- New Zealand Ministry of Education: Home education
- New Zealand Ministry: 2026 home education policy information release
- South Africa Department of Basic Education: Home education
- Ontario: Policy/Program Memorandum 131
- Queensland Department of Education: Registration
- Queensland Department of Education: Annual reporting
- UCAS: Uploading documents to your application
- Information Commissioner's Office: Data minimization

Clearly labeled advocacy and movement sources

- Home School Legal Defense Association: Legal resources
- National Home Education Research Institute

These sources may help families locate practical context and movement research. They are not used as the primary basis for the jurisdiction matrix and should not be confused with government authority or neutral prevalence data.

For the claim-by-claim source map, coding fields, source classifications, and limitations, see the Paperwork Burden Source Ledger.

For the broader distinction between legal, learning, and portable records, read The Global State of Homeschool Record-Keeping 2026. For terminology, see the homeschool glossary. Families comparing school-linked and independent pathways can also read umbrella school versus independent homeschooling.

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