



## CASE MANAGER RESPONSIBILITY THROUGHOUT THE YEAR

### September

- Copy each IEP on your caseload for your working file
- Give to each teacher who supports the child a copy of either the IEP Summary or the IEP
  - Get IEP Service Provider logs signed and placed in the container
- Check to make sure all IEP's have containers on-site
- Review each IEP and document the following
  - When is annual and triennial due? Compare this date to the Exceed date. Investigate any discrepancy
  - Is the child appropriately placed based upon the hours on page one, special factors page one of the IEP and skill level?
  - Do the State and District Test scores indicate the placement is appropriate?
  - What are the areas of need?
    - Academic-what is the child's independent reading score?
    - Behavior-BSP? BIP?
    - Social/emotional
  - Check to Team Action page on the most current IEP(s) for any unresolved issues
  - Review the previous IEP and Triennial. Note any concerns and follow up
- Develop in consultation with your School Psychologist a calendar of completing your IEP's
  - Note on your calendar which DIS providers you will need to contact for the IEP development
  - Do you need to move some annual/triennial IEP dates to even out your schedule and plan to be able to complete all IEP's by the end of the school year? If so, coordinate with all service providers.
  - Backwards plan your IEP's
    - Send out the meeting notice well in advance of the IEP due date
    - Be prepared to hold three IEP meetings before the due date (allowing for "no shows" and postponements)
    - Document each effort to meet with a separate Notice of Meeting form
      - Send the notices multiple ways (student's backpack, email attachment, first class/certified mail, hand deliver)
      - Offer to hold the meeting via conference call, Skype, etc.
      - Meeting can be held at the 3<sup>rd</sup> attempt if Parents are not responding.
- Note how each child is to be supported-by co-teacher, paraprofessional, DIS
  - Make sure each child is being supported by area of need and hours (Student schedule matches IEP services for frequency and duration)
  - Check with your DIS provider(s) to make sure they are seeing the child as often as required in the IEP
- Enter your name as case manager in Exceed
- Enter your name as "Service Provider"
  - Remind related service providers to do the same for your caseload

- Check to see if there are any “Open” messages in Exceed for the child’s IEP. Close these.
- Run your Exceed Reports.
  - Reports-make sure your name appears as case manager
  - Are there any students who have not been assigned a case manager (school’s roster report)?
- If an IEP is overdue, schedule the meeting
- Send out your data collection sheets to teachers and paraprofessionals supporting your students to get feedback on BSP, IEP needs
  - Check with the teachers on how best to get that information from them
- Begin collecting work samples and data sheets to develop a portfolio for the upcoming IEP meeting and to consider draft goals
- Identify who will be the admin for your IEP’s
- Begin testing students for needed pre-test, baseline data
- Get a copy of the students’ schedules (secondary level)
- Find out how you will be notified if students are suspended from school
  - 7-10 days of suspension requires a manifestation determination hearing
- Identify which students will be taking the CAPA next year
- Complete Exceed Exit form and perform due diligence on any students who have not attended
  - Place copy in container

### October

- Compete Exceed Exit forms for any student who has not attended
- Review progress on goals of your caseload
  - Do you need to intervene if student is not being successful
    - Schedule and IEP?
    - Gather data/advice from school psych/related service providers/general ed teacher
- Prepare Progress on Goals Reports
- Consider progress of students, have you begun/documented in the IEP appropriate interventions to support their needs?
- Have you developed a list of those students who qualify for the CAPA? Are you prepared to complete the CAPA report cards to report progress on CAPA Blueprints?
- Get out to teacher any newly completed IEP’s, BSP’s, IEP Summary Sheets
- Did you enter yourself in Exceed as
  - Case manager
  - Service provider
  - Did DIS enter their names in Exceed as service provider for your caseload?
- Are there students on your caseload for whom attendance/tardy issues have arisen?
  - SART/SARB process should be followed, just as it is for students in general education
  - Is a Supplemental IEP needed (to add a goal for this area of need)?

### November

- Check to see which of your students have left the school
  - Complete Exceed Exit forms for any students who have left the school district
  - Place a copy in the container

- District CASEMIS report will be run next month to the state. Are you on-track to complete and lock all IEP's due by 12/1 on time? Unlocked events will count as overdue in CASEMIS.
- Get out to teachers any newly completed IEP's/BSP's/IEP Summary Sheets
  - Get signature logs completed
- Did you lock all completed IEP's
- Check the school suspension report for you caseload-hold manifestation determination as needed.

### December

- Continue progress monitoring of IEP goals and determine issues/concerns and problem solve
- Check to see which of your students have left the school
  - Complete Exceed Exit forms for any students who have left the school district
  - Place a copy in the container
- Lock any completed IEP's
- Distribute any completed IEP's to teachers
  - Get signature logs completed
- Check your school suspension log for your caseload-monitor for Manifestation Determination (MD)
- Are there students on your caseload for whom attendance/tardy issues have arisen?
  - SART/SARB process should be followed, just as it is for students in general education
  - Is a Supplemental IEP needed (to add a goal for this area of need)?

### January

- Update progress on goals, continue to collect body of evidence
- Check to see which of your students have left the school
  - Complete Exceed Exit forms for any students who have left the school district
  - Place a copy in the container
- Distribute any completed IEP's to teachers
  - Get signature logs completed
- Check the suspension report for your caseload
- Schedule IEP meetings for any student who may meet criteria for retention

### February

- Get a report on semester grades and consider what needs to be done next for support
- Check student schedules to make sure they are appropriately placed for the second semester
- Prepare for articulation procedures for your out-going students
- Check to see which of your students have left the school district
  - Complete Exceed Exit forms for any students who have left the school district
  - Place a copy in the container
- In preparation for the state/district-wide assessments
  - Develop a list of your students and the accommodations required in their IEP for your testing coordinator
- Distribute complete IEP's
  - Get signature logs updated

- Check school suspension report for your caseload-monitor for MD
- Are there students on your caseload for whom attendance/tardy issues have arisen?
  - SART/SARB process should be followed, just as it is for students in general education
  - Is a Supplemental IEP needed (to add a goal for this area of need)?

### March

- Begin to complete IEP Summary Sheets for
  - Students articulating to the next grade level
  - Students eligible to attend ESY
- Review Progress Reports on IEP goals and determine if interventions are needed
- Check to see which of your students have left the school
  - Complete Exceed Exit forms for any students who have left the school district
  - Place a copy in the container
- Distribute completed IEP's
  - Update signature logs
- Check school suspension report for your caseload-monitor for MD
- Hold/Lock IEP's

### April

- Complete Exceed Exit forms for any students who have left the district
- IEP Summary Sheets for articulation and summer school
- Distribute completed IEP's
- Check your school suspension report for your caseload
- Did you submit your state/district-wide assessment list of accommodations to your site testing coordinator?
- Are you on-track to complete your IEP's by the end of May/June?
  - Adjust as needed
- Follow procedures for students who are eligible for ESY
- Are there students on your caseload for whom attendance/tardy issues have arisen?
  - SART/SARB process should be followed, just as it is for students in general education
  - Is a Supplemental IEP needed (to add a goal for this area of need)?

### May

- Complete IEP Summary sheets for outgoing and for students attending ESY
- Lock completed IEP's
- Review Progress Reports, consider interventions and hold supplemental IEP meetings if changes are needed
- Complete Exceed Exit Forms for students who have left the district
- Review your school's suspension report for your caseload-monitor for MD

### June

- Complete Exceed Exit forms for students who have left the District
- Lock completed IEP's-CASEMIS report to the state will be based on data in Exceed system

- Check your school suspension list for your caseload
- Are there students on your caseload for whom attendance/tardy issues have arisen?
  - SART/SARB process should be followed, just as it is for students in general education
  - Is a Supplemental IEP needed (to add a goal for this area of need)?

Revised 08.26.2013