## CASE MANAGER RESPONSIBILITIES THROUGHOUT THE YEAR
*Based on a traditional calendar; adjust as needed*

<table>
<thead>
<tr>
<th>Every Month</th>
<th>September</th>
<th>October</th>
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| - For students who are newly enrolled or have newly completed IEPs.  
  - Give each teacher who supports the child a copy of either the IEP Summary or the IEP  
  - Have Service Provider logs signed and placed in the container  
  - Enter yourself as case manager and service provider in the electronic IEP system  
  - For new students: Check to be sure that they are enrolled in Power School.  
  - Run your overdue report  
  - Complete due diligence and Exit form in the Online IEP System on any students who are not attending  
  - Email Naomi Lewis when the exit form is completed. ([nlewis1@sandi.net](mailto:nlewis1@sandi.net))  
  - Place copy in student’s special education container in the cumulative folder on site.  
  - Follow through with your suspension procedures developed with admin.  
  - Review IEP calendar with team members  
  - Ensure that Special Factors Accommodations are being implemented | - Enter your name as case manager and service provider in Electronic IEP System  
  - Copy or download each IEP on your caseload for your working file.  
    - Run your Electronic IEP System Roster Report  
  - Give each teacher who supports the student a copy of either the IEP Summary or the IEP  
    - Have IEP Service Provider logs signed and placed in the container  
  - Review each IEP and document the following:  
    - Annual and Triennial due dates; compare this date to the Electronic IEP system & investigate discrepancies  
    - Ensure proper placement...check the services page, special factors page 1, Federal Handicapping Condition (FHC) and skill level.  
    - Identify areas of need for each student  
      - Academic; Behavior;  
      - Social/Emotional;  
      - Independent Living; Heath  
    - Check the current IEP Team Action Page for unresolved issues  
  - Transportation  
    - Verify eligibility; pick up and drop off information  
  - Identify appropriate state testing  
  - Begin collecting data on goals | - Review student progress on IEP goals and General Ed student progress reports  
  - For students not making adequate progress consider the following:  
    - Consult with Related Service Providers  
    - Consult with assigned classroom teachers  
    - Convene a Supplemental IEP meeting  
  - ECSE Fall DRDP observation/documentation period begins (0-5 year old) |

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<tr>
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<th>November</th>
<th>December</th>
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  - Lock all IEPs for the December CASEMIS | - Review student progress on IEP goals and General Ed student progress reports  
  - For students not making adequate progress consider the following:  
    - Consult with Related Service Providers  
    - Consult with assigned classroom teachers  
    - Convene a Supplemental IEP meeting  
  - ECSE- Fall DRDP data submitted to DRDP access website |
# CASE MANAGER RESPONSIBILITIES THROUGHOUT THE YEAR

<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
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| - Follow through with your suspension procedures developed with admin.  
- Determine Extended School Year (ESY) appropriate placement Y/N, based on retention and recoupment data. | - Review semester grades (Secondary)  
- Check student schedules to make sure they are appropriately placed for second semester  
- Prepare articulation procedures for your outgoing students  
- In preparation for the state/district-wide assessments (traditional calendar sites)  
  - Develop a list of your students and the accommodations required in their IEP for your testing coordinator  
  - Meet with your site testing coordinator  
- **ECSE-** Conduct TK/K transition IEP for each student entering TK/K next school year. | - Follow up with site testing coordinator regarding CAASPP testing.  
- Create IEP Summary Sheets for articulation and Extended School Year (ESY).  
- **ECSE-** Spring DRDP observation/documentation period begins (0-5 year old). |

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<tr>
<th>April</th>
<th>May</th>
<th>June</th>
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| - Follow up with site testing coordinator regarding CAASPP testing.  
- Create IEP Summary Sheets for articulation and Extended School Year (ESY). | - Complete IEP Summary sheets for outgoing students and for students attending Extended School Year (ESY)  
- Review student progress on IEP goals and General Ed student progress reports  
- For students not making adequate progress consider the following:  
  - Consult with Related Service Providers  
  - Consult with assigned classroom teachers  
  - Convene a Supplemental IEP meeting | - Complete progress reports to be sent home.  
- Lock all IEPs for June CASEMIS  
- Be sure that the container is up-to-date & is housed with the cumulative folder.  
- Complete the Summary of Performance for students graduating without a diploma or aging out (Secondary)  
- Set up transportation (F-12s) for fall of the coming school year  
- **ECSE-** Spring DRDP data submitted to DRDP access website |

*Based on a traditional calendar; adjust as needed*