

Case manager Checklist

Student's Name: _____

IEP Date: _____

DUE: _____

Prior to IEP meeting:

60 days prior- Date: _____

- ☐ Send AP (if Triennial)

*Begin assessments as soon as AP comes back signed

- ☐ Make sure to invite:
 - ☐ Principal
 - ☐ Vice Principal
 - ☐ General ed teachers
 - ☐ Service providers
 - ☐ Interpreter (if needed) *Ask Office for list
 - ☐ Psychologist (if triennial)

30 days prior- Date: _____

- ☐ Meeting notice sent to parent
- ☐ Excusal form for general ed teachers sent to parent (partial excusals)
- ☐ Confirm Interpreter (if needed)
- ☐ Administer informal assessments with student
- ☐ Write present levels → check in with:
 - ☐ General Ed teachers
 - ☐ Service providers
 - ☐ Nurse (if a triennial)

2 weeks prior- Date: _____

IF PRESENT LEVELS ARE NOT COMPLETE!

- ☐ Send reminder email to all staff involved including:
 - ☐ General Ed teachers
 - ☐ Service providers
 - ☐ Nurse (if triennial)
- ☐ *Send your assessment results to Psych

1 week prior- Date: _____

- ☐ Send reminder email to all staff involved (you can preset this)
- ☐ Confirm with parent
- ☐ look at calendar, coordinate which conference room you will be using and add it to the calendar invite
- ☐ Send Draft IEP: ***DO NOT include service/accommodation pages!**
(See list on back)

☐ **DRAFT IEP LIST:**

- ☐ Demographics
- ☐ Present levels
- ☐ Special factors
- ☐ Assessments
- ☐ Goals

- Attach any reports, PWNs, etc. to the IEP on SEIS (if needed, or if a triennial)

3-5 days prior-Date: _____

- ☐ Call parent-review questions and concerns about draft IEP
- ☐ Confirm with interpreter (if needed)
- ☐ Have a colleague review your draft (recommended)

1 day prior- Date: _____

- ☐ Reminder email to staff (you can preset this)
- ☐ Prepare and review full IEP **WITH** services and accommodations
- ☐ Print IEP with page numbers (recommended)

Day of IEP- Date: _____

- ☐ Reminder email to staff (you can preset this)
- ☐ Review IEP (Checklist for original copy of IEP is in office with parent rights)
- ☐ Grab Parent rights
- ☐ Prep agenda on notes page (Example in shared drive)

Post IEP meeting:

| | |
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| <p><u>If signed:</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Please make sure the pages of the IEP are numbered when you print it out<input type="checkbox"/> Make 2 copies and send to<ul style="list-style-type: none"><input type="checkbox"/> parent<input type="checkbox"/> Teacher file<input type="checkbox"/> <u>Attach IEP submission page to the ORIGINAL</u> and send to: SPED D.O. Attn: Wendy Urteaga From: Name @ Site<input type="checkbox"/> Affirm/Attest -Include IEP @ glance<input type="checkbox"/> Clean up future IEP on SEIS (delete old notes, goals, etc)<input type="checkbox"/> Email new IEP @ glance (from future IEP) to office staff | <p><u>If NOT signed:</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Write what the parents did not agree with in the notes<input type="checkbox"/> Give parent a copy of the IEP<input type="checkbox"/> Notify the program specialist<input type="checkbox"/> Notify Admin<input type="checkbox"/> Set up second IEP meeting <p>* If you cannot meet again within 2 weeks- Affirm the IEP and note the issue</p> <ul style="list-style-type: none"><input type="checkbox"/> Follow the current IEP until the future IEP is signed <p><u>If you set up a Part 2 or follow up meeting:</u> When is it? _____</p> <ul style="list-style-type: none"><input type="checkbox"/> send out meeting notice<input type="checkbox"/> put on Calendar and invite the needed service providers |
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