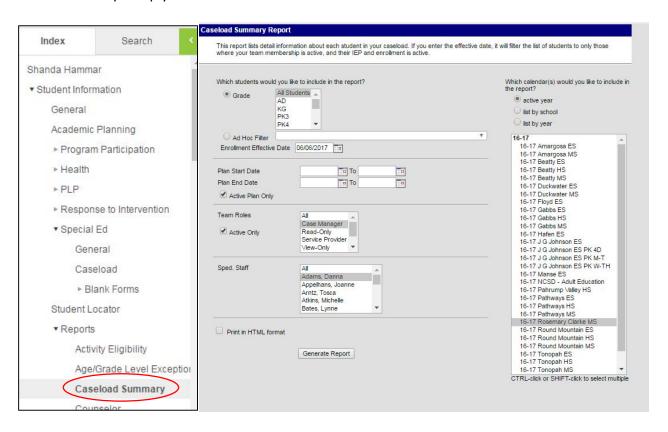## Caseload Summary Report

- **This is your special ed caseload**.

- **You need to manage it and keep it current**.

- Even if you list yourself as Case Manager for a student and the student's name shows when you click on Caseload in the index, this does not add them to your Caseload Summary Report until you have started an IEP on that student. The student is not officially on your Caseload until he/she has an IEP.

  o Index>Student Information>Reports>Caseload Summary
  o Select Grade, Team Role (Case Manager), scroll to your name in Sped Staff, Select your school/schools (Ctrl key to select multiple schools), Generate Report
  o You can add filter by dates, active only, Ad Hoc Filters, but for the most part you'll just pull up your caseload as listed above.

Caseload Summary Report

- o Once you have pulled up your Caseload Summary Report, you can review it for students, IEPs, eligibilities, anything that is missing/incomplete

- o The Re-Eval Date is populated when school psychologists/speech pathologists do Evaluations/Eligibility in IC. Therefore, this column will populate over the course of the next 3 years as all students have their 3 Year Evaluations completed in IC. Until that time, this column will not be fully populated.

- o Notice the header tracks how many students you have on your caseload and how many total plans (it tracks all IEPs held on a student during the school year). Number of students is your caseload.

12 Nye District Generated on 06/06/2017 08:30:33 AM Page 1 of 1	**Caseload Summary Report** Calendar: 16-17 Rosemary Clarke MS All Grades Role(s): Case Manager Staff: 1 Students: 9 Plans: 11

1. Adams, Danna   Plans: 11   Students: 9

Calendar	Grade Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
16-17 Rosemary Clarke MS 07/01/2016-06/30/2017 Plan: 11 Students: 9	07		Autism Spectrum Disorder	1 / B11	10/23/2019*	SPED	09/27/2016 - 09/27/2017	Case Manager
						SPED	12/01/2016 - 12/01/2017	Case Manager
	07		Autism Spectrum Disorder	1 / B11		SPED	04/27/2017 - 04/27/2018	Case Manager
	06		Autism Spectrum Disorder	1 / E5	05/17/2020*	SPED	05/18/2017 - 05/18/2018	Case Manager
	07		Autism Spectrum Disorder	1 / B11	03/20/2020*	SPED	03/21/2017 - 03/21/2018	Case Manager
	08		Autism Spectrum Disorder	1 / B10		SPED	05/01/2017 - 11/30/2017	Case Manager
	08		Health Impairment	1 / B11		SPED	05/09/2017 - 12/13/2017	Case Manager
	06)		Health Impairment	1 / E5	05/01/2020*	SPED	04/24/2017 - 04/24/2018	Case Manager
						SPED	05/02/2017 - 05/02/2018	Case Manager
	07 (#35567)		Autism Spectrum Disorder	1 / B11		SPED	02/14/2017 - 02/14/2018	Case Manager
	07		Autism Spectrum Disorder	1 / B11		SPED	02/16/2017 - 02/16/2018	Case Manager

* The determination date was missing so the Re-eval date was calculated using the evaluation date of the most recent locked evaluation.