

Case Manager Checklist

| Area of responsibility | Activities |
|--|---|
| Managing your caseload/ knowing your students | <input type="checkbox"/> Communicate with families (e.g., send a letter or call home to introduce yourself as the student's case manager) |
| | <input type="checkbox"/> Review and check student files/records |
| | <input type="checkbox"/> Manage and coordinate with paraprofessionals |
| | <input type="checkbox"/> Communicate with families regarding IEP timelines |
| | <input type="checkbox"/> IEP compliance items as needed |
| | <input type="checkbox"/> Meet and welcome your students |
| Consulting and teaching | <input type="checkbox"/> Create "IEP at a glance" or accommodations chart for all teachers |
| | <input type="checkbox"/> Monitor students' IEP goals and objectives for progress |
| | <input type="checkbox"/> Conduct data collection, teacher narratives, and progress monitoring |
| | <input type="checkbox"/> Coordinate related services (e.g., speech, assistive technology and psychologist) |
| | <input type="checkbox"/> Create lesson plans and instructional strategies to support the IEP goals |
| | <input type="checkbox"/> Conduct functional behavior assessments and behavior plans |
| | <input type="checkbox"/> Consult with outside agencies |
| IEP maintenance | <input type="checkbox"/> Lead IEP and related meetings (re-evaluations, etc.) |
| | <input type="checkbox"/> Coordinate meetings with families and staff |
| | <input type="checkbox"/> Transition items with student input |
| | <input type="checkbox"/> Write IEPs to include input from teachers and families |
| | <input type="checkbox"/> Present level of performance to include data |
| | <input type="checkbox"/> Write measurable and appropriate goals |
| | <input type="checkbox"/> Monitor behavior plans |
| | <input type="checkbox"/> Ensure compliance with all IEP and related timelines |
| | <input type="checkbox"/> Ensure IEP compliance throughout the document |
| | <input type="checkbox"/> Perform IEP progress reports |
| | <input type="checkbox"/> Maintain confidential copies of documents and information |
| Professionalism | <input type="checkbox"/> Provide confidentiality and maintenance of records |
| | <input type="checkbox"/> Act with professional courtesy regarding timelines and expectations from teachers and related services |
| | <input type="checkbox"/> Communicate with families and families throughout the year |
| | <input type="checkbox"/> Foster positive and productive meetings |
| | <input type="checkbox"/> Follow through and follow up with questions or concerns |
| | <input type="checkbox"/> Attend professional-development opportunities regarding case management |