SPECIAL EDUCATION

EDITABLE

CASE MANAGER BINDER

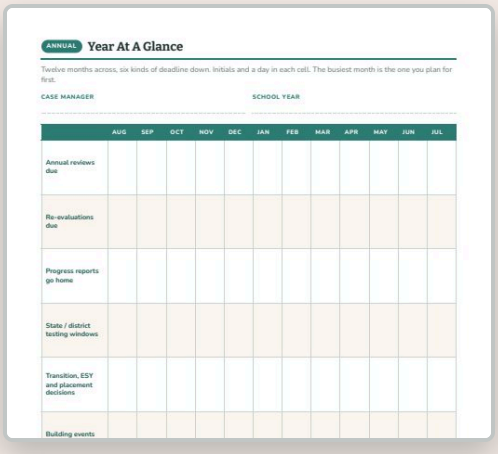
The year, the caseload and the paper trail: calendar, IEP and evaluation trackers, service and contact logs, meeting pages, file audit, checklists. Fillable PDF.


SETUP Caseload Roster and Team

Every student, their teachers and providers, and how the family prefers to be reached. The page you open when the phone rings.

CASE MANAGER | SCHOOL YEAR | UPDATED

STUDENT	GR	HOMEROOM / GEN-ED TEACHER	RELATED SERVICES (WHO)	PARENT / GUARDIAN	BEST WAY AND TIME TO REACH	LANGUAGE


ANNUAL Year At A Glance

Twelve months across, six kinds of deadline down. Initials and a day in each cell. The busiest month is the one you plan for first.

CASE MANAGER | SCHOOL YEAR

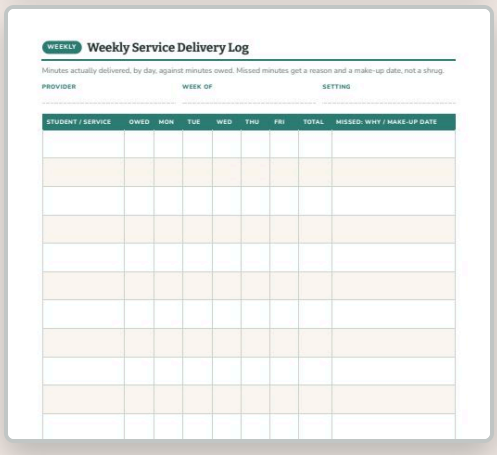
	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
Annual reviews due												
Re-evaluations due												
Progress reports go home												
State / district testing windows												
Transition, ESY and placement decisions												
Building events												


ANNUAL IEP Due-Date Tracker

One row per student, one column per step from data pull to distribution. A date in every box or a blank you can see from across the room.

CASE MANAGER | SCHOOL YEAR | UPDATED

STUDENT	IEP DATE	ANNUAL DUE	DATA PULLED	DRAFT DONE	INVITE SENT	MEETING HELD	FINALIZED	SENT HOME


WEEKLY Weekly Service Delivery Log

Minutes actually delivered, by day, against minutes owed. Missed minutes get a reason and a make-up date, not a shrug.

PROVIDER | WEEK OF | SETTING

STUDENT / SERVICE	OWED	MON	TUE	WED	THU	FRI	TOTAL	MISSED: WHY / MAKE-UP DATE


MEETING IEP Meeting Agenda and Sign-In

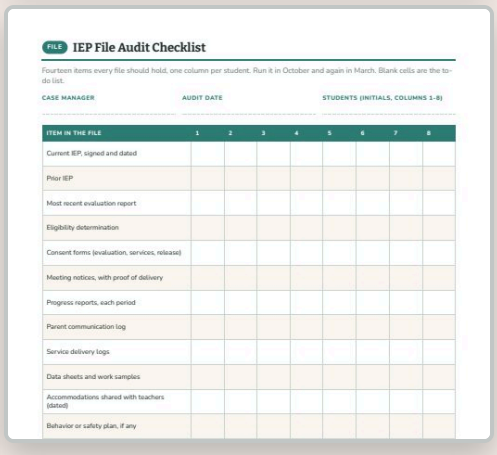
One page per meeting. Check items off as you go; the sign-in table at the bottom goes in the file the same day.

STUDENT | DATE AND TIME | MEETING TYPE | LOCATION / LINK

	AGENDA	MIN	NOTES / WHO
☐	Welcome, introductions, purpose of the meeting		
☐	Parent and student input; strengths and concerns		
☐	Present levels: what the data says now		
☐	Progress on current goals		
☐	Proposed goals		
☐	Services, accommodations and placement		
☐	Transition, ESY, testing or other decisions on the table		
☐	Questions; next steps and who does what		
☐	Who receives copies, and how		
☐			
☐			

SIGN-IN

NAME	ROLE	SIGNATURE	COPY?


FILE IEP File Audit Checklist

Fourteen items every file should hold, one column per student. Run it in October and again in March. Blank cells are the to-do list.

CASE MANAGER | AUDIT DATE | STUDENTS (INITIALS, COLUMNS 1–8)

ITEM IN THE FILE	1	2	3	4	5	6	7	8
Current IEP, signed and dated								
Prior IEP								
Most recent evaluation report								
Eligibility determination								
Consent forms (evaluation, services, release)								
Meeting notices, with proof of delivery								
Progress reports, each period								
Parent communication log								
Service delivery logs								
Data sheets and work samples								
Accommodations shared with teachers (dated)								
Behavior or safety plan, if any								

Fillable PDF | **28 Pages** | **Trackers + Logs** | **File Audit**

BRIGHT PATH SPED

BINDER

How This Binder Works

Three loops. The pages are grouped by how often you touch them.

A case manager's year is not a list of tasks; it is three loops running at once. The pages in this file are arranged by loop, so the ones you touch every week are together and the ones you touch twice a year are together.

1. **The annual loop (pages 10 to 13).** The year calendar, the IEP due-date tracker, the evaluation tracker, the progress-report schedule. Filled in during the first two weeks from the IEPs themselves, then checked monthly.
2. **The weekly loop (pages 14 to 18).** Your master schedule, the weekly service log, the parent contact log, the meeting log, the document log. Ten minutes on Friday keeps them current; that is the whole habit.
3. **The meeting loop (pages 19 and 20).** One agenda-and-sign-in page and one notes page per meeting. Print them the night before; file them the same day.
4. **The file (page 21).** The audit checklist, one column per student, run twice a year. It is how you find the missing consent form in October instead of April.
5. **Opening and closing (pages 22 to 24).** The start-of-year checklist, the monthly checklist, and the end-of-year hand-off. The hand-off is the page the next case manager will thank you for.
6. **Setup (pages 5 to 9).** Cover, spine, dividers, roster, student sheets, team directory. Done once, in August.

What this binder is not

It is not the data system (that is IEP Goal Tracking), not the one-page snapshot (IEP At A Glance), and not your district's legal forms. Every "due" column here is filled in from the IEP and from the timelines your district gives you; nothing on these pages asserts a timeline. The example on page 25 is an invented student.

When the binder gets opened

WHEN	WHICH PAGES
Friday, ten minutes	Service log (15), contact log (16), meeting log (17), document log (18)
Last Friday of the month	Monthly checklist (23); year calendar (10) checked against the trackers (11, 12)
October and March	File audit (21), one column per student; gaps onto the trackers

Where the other products plug in

The student sheet (8) sits in front of that student's At A Glance page. The service log (15) feeds the caseload minutes tracker in At A Glance. The progress-report schedule (13) is fed by Goal Tracking. Meeting Prep supplies the parent input form that goes out with the invite dated on page 11.

What a substitute case manager needs

Pages 7, 9, 10, 11 and 14, in that order. Everything else can wait for you; those five cannot.

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ANNUAL

Year At A Glance

Twelve months across, six kinds of deadline down. Initials and a day in each cell. The busiest month is the one you plan for first.

CASE MANAGER

SCHOOL YEAR

	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
Annual reviews due												
Re-evaluations due												
Progress reports go home												
State / district testing windows												
Transition, ESY and placement decisions												
Building events and breaks												

Initials and a day

"JR 14, MT 22" in the October annual-review cell is enough; the tracker on the next page holds the rest. When a cell has four names in it, that is the month to start early.

The busiest month, and what moves

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ANNUAL

IEP Due-Date Tracker

One row per student, one column per step from data pull to distribution. A date in every box or a blank you can see from across the room.

CASE MANAGER

SCHOOL YEAR

UPDATED

STUDENT	IEP DATE	ANNUAL DUE	DATA PULLED	DRAFT DONE	INVITE SENT	MEETING HELD	FINALIZED	SENT HOME

Read it right to left

The annual due date comes from the IEP. The six columns after it are the work that makes the meeting a good one, and each is dated when it is DONE, not when it is planned. The number of days between them is your district's rule, written on the right.

Our prep timeline (days before the due date), and who told me

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WEEKLY

Parent and Family Contact Log

Every call, email, note and conversation. Date, method, topic, what was agreed, and whether it needs a follow-up.

CASE MANAGER _____ **SCHOOL YEAR** _____

DATE	STUDENT	WHO	METHOD	TOPIC AND WHAT WAS AGREED	FOLLOW-UP BY	DONE

Method: C call · E email · N note home · M in person · P portal

Write the attempt even when nobody answered: “C, no answer, left message” is a record; a blank is not. Two lines of what was agreed beats a paragraph of what was said.

FILE

IEP File Audit Checklist

Fourteen items every file should hold, one column per student. Run it in October and again in March. Blank cells are the to-do list.

CASE MANAGER _____ AUDIT DATE _____ STUDENTS (INITIALS, COLUMNS 1-8) _____

ITEM IN THE FILE	1	2	3	4	5	6	7	8
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Eligibility determination								
Consent forms (evaluation, services, release)								
Meeting notices, with proof of delivery								
Progress reports, each period								
Parent communication log								
Service delivery logs								
Data sheets and work samples								
Accommodations shared with teachers (dated)								
Behavior or safety plan, if any								
Transition plan, if age applies								
Amendments and PWN-type notices, as district names them								

Marks: ✓ present · D date it is due · – not applicable

Fourteen items is the common core; your district's own file checklist wins wherever it differs. Add its extra items on the lines to the right, and run this page before anyone else runs it for you.

Items our district also requires

_____

_____

_____

_____

_____

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