

New Case Manager Starter Kit

SECTION 2 · KNOW THE CASELOAD AND THE SYSTEMS

CASE MANAGER STARTER KIT

CHECKLIST Caseload Audit Checklist

One row per student on the caseload, so an inherited stack of files becomes a page you can read in five minutes. Dates and services are copied off the file in front of you, never assumed.

CASE MANAGER

SCHOOL / BUILDING

SCHOOL YEAR

CASELOAD SIZE

#	STUDENT	GRADE	WHAT I HAVE ON FILE	WHAT I'M STILL MISSING	CURRENT PLAN DATE (FROM THE FILE)	SERVICES (A FEW WORDS)	NOTE FOR MYSELF
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							

ONE ROW PER STUDENT, COPIED FROM THE FILE

"What I have" and "what I'm still missing" are read off the actual folder in front of you, not assumed. The date column is whatever date is printed on the plan you were handed — not a due date, and not a deadline this file states.

IF THE CASELOAD RUNS LONGER THAN ONE PAGE

Print this page twice and number the rows straight through; the roll-up (page 17) only needs the totals.

Page 12 of 21

BRIGHT PATH SPED

EARINGS

CASE MANAGER STARTER KIT

First 30/60/90 Days, at a Glance

checkpoints, so the whole ninety days fits on one page. The week-by-week checklist (page 9) spreads the same plan.

SCHOOL / BUILDING

START DATE

DAYS 31-60: KNOW THE CASELOAD AND THE SYSTEMS

☐ Finished the caseload audit (page 12)

☐ Confirmed accommodations are known in every general education classroom on the caseload

☐ Observed or sat in on at least one meeting before leading one

☐ Met with my supervisor to review priorities

☐ Built a meeting-prep routine (page 14)

DAYS 61-90: SHOW WHAT YOU KNOW

☐ Sent the introduction letter to every family on the caseload (page 16)

☐ Led or co-led a first meeting

☐ Completed the 30/60/90 roll-up (page 17)

☐ Named two or three things to watch going into the next quarter

☐ Handed my supervisor a current caseload snapshot

Tick each one as it is finished; the week-by-week checklist (page 9) spreads the weeks if a page-a-week pace fits your building better, and the roll-up page turn into a report for your supervisor.

IF YOUR CASELOAD IS LARGER THAN SIX OR EIGHT STUDENTS

The fifteen tasks stay the same size; only the caseload audit (page 12) and the contacts log (page 10) get longer. Print a second copy of either page rather than shrink the plan to fit a smaller caseload than you actually have.

IF THE ORDER DOES NOT MATCH YOUR BUILDING'S CALENDAR

The three checkpoints are named for the order tasks usually make sense in, not a fixed date. A task from Days 31-60 that your building needs on day five is fine to do early; the week-by-week checklist (page 9) is the version to reorder if that happens more than once.

Page 8 of 21

BRIGHT PATH SPED

CONTENTS

What Is Inside, and Where

21 pages: three sections, an acronym glossary, an organizer and a worked example. No page here states a timeline, an eligibility rule or a definition your own district gets to write.

Before you begin

PAGES 4–6

	Start Here — Three Steps START HERE	4		Binder Cover and Divider Tabs SETUP	5		Our District's Acronyms and Terms SETUP	6
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01 Get Your Bearings

PAGES 8–10

	The First 30/60/90 Days, at a Glance REFERENCE	8		Week-by-Week Onboarding Checklist CHECKLIST	9		Key Contacts Log LOG	10
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02 Know the Caseload and the Systems

PAGES 12–14

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03 Show What You Know

PAGES 16–19

	Introduction Letter to Families NOTES	16		30/60/90 Progress Roll-Up TRACKER	17		Phrase Bank for Letters and Notes REFERENCE	18
	For a Long-Term Substitute or Paraprofessional Stepping In REFERENCE	19						

Worked example

PAGE 20

	One New Case Manager's First 90 Days, Filled In EXAMPLE	20
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THE THREE FORMS OF THE PLAN, SIDE BY SIDE

A quick view (page 8): the whole ninety days, fifteen tasks, one page.

A detailed, week-by-week checklist (page 9): the same tasks, spread across twelve weeks with room to tick each one done.

A whole-caseload audit (page 12): one row per student instead of one row per week.

☆ START HERE

Start Here — Three Steps

Ninety seconds of reading. Set the glossary and the contacts log up as you go; the plan itself is built to be read in five minutes.



1

Set up once

Open the file in Adobe Acrobat Reader (free) or Preview on a Mac — not a browser tab, which may fill fields and then not save them.

Print the binder cover and divider tabs (page 5) and write in the acronym glossary (page 6) and your key contacts (page 10) as you learn them — this page does not need to be finished on day one.



2

Work the 30/60/90

The quick view (page 8) is the whole plan on one page; the week-by-week checklist (page 9) is the same plan spread across twelve weeks with room to tick each task done.

Use the caseload audit (page 12) to turn the files you inherited into one row per student, and the filing guide and meeting-prep basics (pages 13–14) to build the systems around them.



3

Show what you know

Send the family letter (page 16) once your caseload audit is underway, and complete the roll-up (page 17) at the ninety-day mark.

If someone else needs to step in, the condensed briefing (page 19) is built for them, not for you.

WHAT THIS FILE IS

A fillable PDF: an onboarding plan, logs, a caseload audit, and templates for the letters and notes a new case manager would otherwise write from scratch. It works offline, with no account or subscription, and looks the same on every machine that opens it.

WHAT THIS FILE IS NOT

Not a Google Sheets file, a Google Doc, or an Excel workbook, and it does not calculate a percent or a count for you. You can type in it and print it; you cannot drag the boxes around or restyle the page.

THE ONE RULE EVERY PAGE IN THIS FILE FOLLOWS

Not a certification record, not a legal timeline, and not a statement of what your district's policy requires. Every date, deadline and definition in this file — including the acronym glossary (page 6) — is a blank line you fill in from your own district's rule or your own IEP file.

IF SOMETHING DOES NOT WORK

The text disappears when I close it. It was opened in something that fills fields but does not save them. Open it in Acrobat Reader and use Save As.
My caseload runs longer than one audit page. Print page 12 twice and number the rows straight through.
Anything else — the Ask a Question tab on the product page. Every question is read, and a fix to the file is a free update.

CONFIDENTIALITY

A filled-in caseload audit or contacts log is a student record. Store, hand over and destroy it the way your school already handles any student record; use first names only on any page that may leave the building.

REFERENCE

The First 30/60/90 Days, at a Glance

Fifteen tasks across three checkpoints, so the whole ninety days fits on one page. The week-by-week checklist (page 9) is the detailed version of the same plan.

CASE MANAGER

SCHOOL / BUILDING

START DATE

DAYS 1–30: GET YOUR BEARINGS

- ☐ Pulled a current copy of every IEP or 504 plan on the caseload
- ☐ Met with the outgoing case manager or building administrator, if either is available
- ☐ Set up the binder and filing system (page 13)
- ☐ Introduced myself to every related-service provider on the caseload (page 10)
- ☐ Started the caseload audit (page 12)

DAYS 31–60: KNOW THE CASELOAD AND THE SYSTEMS

- ☐ Finished the caseload audit (page 12)
- ☐ Confirmed accommodations are known in every general education classroom on the caseload
- ☐ Observed or sat in on at least one meeting before leading one
- ☐ Met with my supervisor to review priorities
- ☐ Built a meeting-prep routine (page 14)

DAYS 61–90: SHOW WHAT YOU KNOW

- ☐ Sent the introduction letter to every family on the caseload (page 16)
- ☐ Led or co-led a first meeting
- ☐ Completed the 30/60/90 roll-up (page 17)
- ☐ Named two or three things to watch going into the next quarter
- ☐ Handed my supervisor a current caseload snapshot

HOW THIS PAGE WORKS

Fifteen tasks, five per checkpoint. Tick each one as it is finished; the week-by-week checklist (page 9) spreads the same fifteen tasks across twelve weeks if a page-a-week pace fits your building better, and the roll-up (page 17) is where the ticks on this page turn into a report for your supervisor.

IF A TASK DOES NOT APPLY TO YOUR BUILDING

Cross it out rather than skip it silently — a crossed-out task with a one-word reason (“no assigned mentor”, “role combined with counseling”) is still useful to whoever reads this page after you, and to you in six months when you cannot remember why a box was left blank.

IF YOUR CASELOAD IS LARGER THAN SIX OR EIGHT STUDENTS

The fifteen tasks stay the same size; only the caseload audit (page 12) and the contacts log (page 10) get longer. Print a second copy of either page rather than shrink the plan to fit a smaller caseload than you actually have.

IF THE ORDER DOES NOT MATCH YOUR BUILDING'S CALENDAR

The three checkpoints are named for the order tasks usually make sense in, not a fixed date. A task from Days 31–60 that your building needs on day five is fine to do early; the week-by-week checklist (page 9) is the version to reorder if that happens more than once.

 CHECKLIST

Caseload Audit Checklist

One row per student on the caseload, so an inherited stack of files becomes a page you can read in five minutes. Dates and services are copied off the file in front of you, never assumed.

CASE MANAGER		SCHOOL / BUILDING		SCHOOL YEAR		CASELOAD SIZE	
#	STUDENT	GRADE	WHAT I HAVE ON FILE	WHAT I'M STILL MISSING	CURRENT PLAN DATE (FROM THE FILE)	SERVICES (A FEW WORDS)	NOTE FOR MYSELF
1							
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IF THE CASELOAD RUNS LONGER THAN ONE PAGE

Print this page twice and number the rows straight through; the roll-up (page 17) only needs the totals.

 NOTES

Introduction Letter to Families

Ready to send in the first weeks with a new caseload, printed or typed. Nothing here commits your team to a schedule it does not already follow — every specific is a blank you fill in.

FAMILY / STUDENT NAME	SCHOOL YEAR	DATE SENT

INTRODUCTION

Who you are, your role, and how you came to work with this student — a few sentences in your own words.

WHAT STAYS THE SAME

The services and supports already written in the current IEP or 504 continue as written; name anything that is not changing.

HOW TO REACH ME

BEST WAY TO REACH ME	TYPICAL RESPONSE TIME	OFFICE HOURS, IF APPLICABLE

WHAT TO EXPECT THIS YEAR (ADD OR REMOVE ROWS TO MATCH YOUR TEAM'S OWN ROUTINE)

#	WHAT	WHEN (YOUR TEAM'S SCHEDULE)	WHO TO CONTACT
1			
2			
3			
4			

CASE MANAGER SIGNATURE	DATE

 TRACKER

30/60/90 Progress Roll-Up

What the first, second and third checkpoints actually produced, in counts, not a paragraph you have to write from memory.

CASE MANAGER	SCHOOL / BUILDING	SCHOOL YEAR	ROLL-UP DATE
CHECKPOINT	TASKS COMPLETE (OF 5, PAGE 8)	STILL OPEN	NOTES FOR MY SUPERVISOR
Days 1–30			
Days 31–60			
Days 61–90			
Full 90 days			

CASELOAD SNAPSHOT AT THIS CHECKPOINT

STUDENTS ON CASELOAD	FILES FULLY ON HAND	FAMILIES SENT A LETTER	MEETINGS LED OR CO-LED
CONTACTS LOGGED	WEEKS OF THE CHECKLIST DONE	AUDIT ROWS STILL FLAGGED	ACRONYM GLOSSARY STARTED?

REVIEWED WITH MY SUPERVISOR

DATE REVIEWED	SUPERVISOR INITIALS

If a checkpoint runs behind, note it here rather than leave the row blank — a roll-up that shows what slipped, and why, is more useful to a supervisor than one that looks perfect and is not checked against anything.

WHERE EVERY NUMBER ON THIS PAGE COMES FROM

“Tasks complete” is a count off the quick view (page 8); the caseload snapshot is a count off the caseload audit (page 12), the contacts log (page 10) and the family letter (page 16). The full-ninety-days row is the three checkpoint rows added together, not a separate estimate. Nothing on this page is a number this file supplies for you.

WHO THIS PAGE IS FOR

Your supervisor first, since it is built to be read in a two-minute check-in rather than explained from memory; the person after you second, since a finished roll-up is the fastest way for a new case manager to see what a normal first ninety days actually produced.

EXAMPLE

One New Case Manager's First 90 Days, Filled In

SAMPLE · INVENTED STUDENT

Ms. Rivera and her six students are invented, and so is every number on this page. Every total can be re-added from the rows above it.

CASELOAD AUDIT (PAGE 12) — MS. RIVERA, 6 STUDENTS, ALL INVENTED, SEPTEMBER OF HER FIRST YEAR

#	STUDENT	GR	HAVE	STILL MISSING	PLAN DATE	SERVICES	NOTE
1	Owen	4	IEP, eval report	–	Nov 12	Resource reading, 120 min/wk	–
2	Priya	2	IEP only	Progress reports	Feb 3	Speech, 60 min/wk	Locate progress reports
3	Marcus	5	IEP, eval, progress reports	–	May 20	Co-taught math, OT consult	–
4	Lena	1	IEP	Accommodations confirmation	Sep 30	Resource math, 90 min/wk	Confirm accommodations with teacher
5	Theo	3	IEP, eval	Progress reports	Jan 15	Behavior support, check-in/check-out	Locate progress reports
6	Grace	5	IEP, eval, progress reports, contact log	–	Apr 8	Speech, 30 min/wk	–

At day thirty, 3 of 6 students had a complete file on hand (Owen, Marcus, Grace); the other 3 (Priya, Lena, Theo) each had exactly one item still to locate.

30/60/90 ROLL-UP (PAGE 17) — SAME CASELOAD, NINETY DAYS IN

CHECKPOINT	TASKS COMPLETE (OF 5)	STILL OPEN	NOTES FOR MY SUPERVISOR
Days 1–30	5 of 5	–	Caseload audit shows 3 of 6 files complete; two contacts still to add.
Days 31–60	4 of 5	Confirming accommodations are known in every classroom	Lena's and Theo's classroom teachers still to confirm.
Days 61–90	4 of 5	Naming two or three things to watch next quarter	All 6 files now complete; all 6 families sent the letter.
Full 90 days	13 of 15	2 of 15 (see above)	6 of 6 files complete, up from 3 of 6 at day thirty.

Tasks complete: $5 + 4 + 4 = 13$ of 15 across the three checkpoints (page 8). Files on hand went from 3 of 6 at day thirty to **6 of 6** by day ninety — Priya's progress reports, Lena's accommodations confirmation and Theo's progress reports were the three items closed in between.

WHY THIS IS ENOUGH

Every number here came from a cell filled in the week it happened, on the caseload audit above or on the quick view it is counted from. The roll-up total is addition, twice: five tasks per checkpoint added across three checkpoints, and three students' missing items subtracted from six as each one was located. Nothing on this page checks a box or writes a conclusion about a student that the audit rows do not already show, and nothing on it states a timeline or a rule — Ms. Rivera's own building set the pace, this file only kept the count.