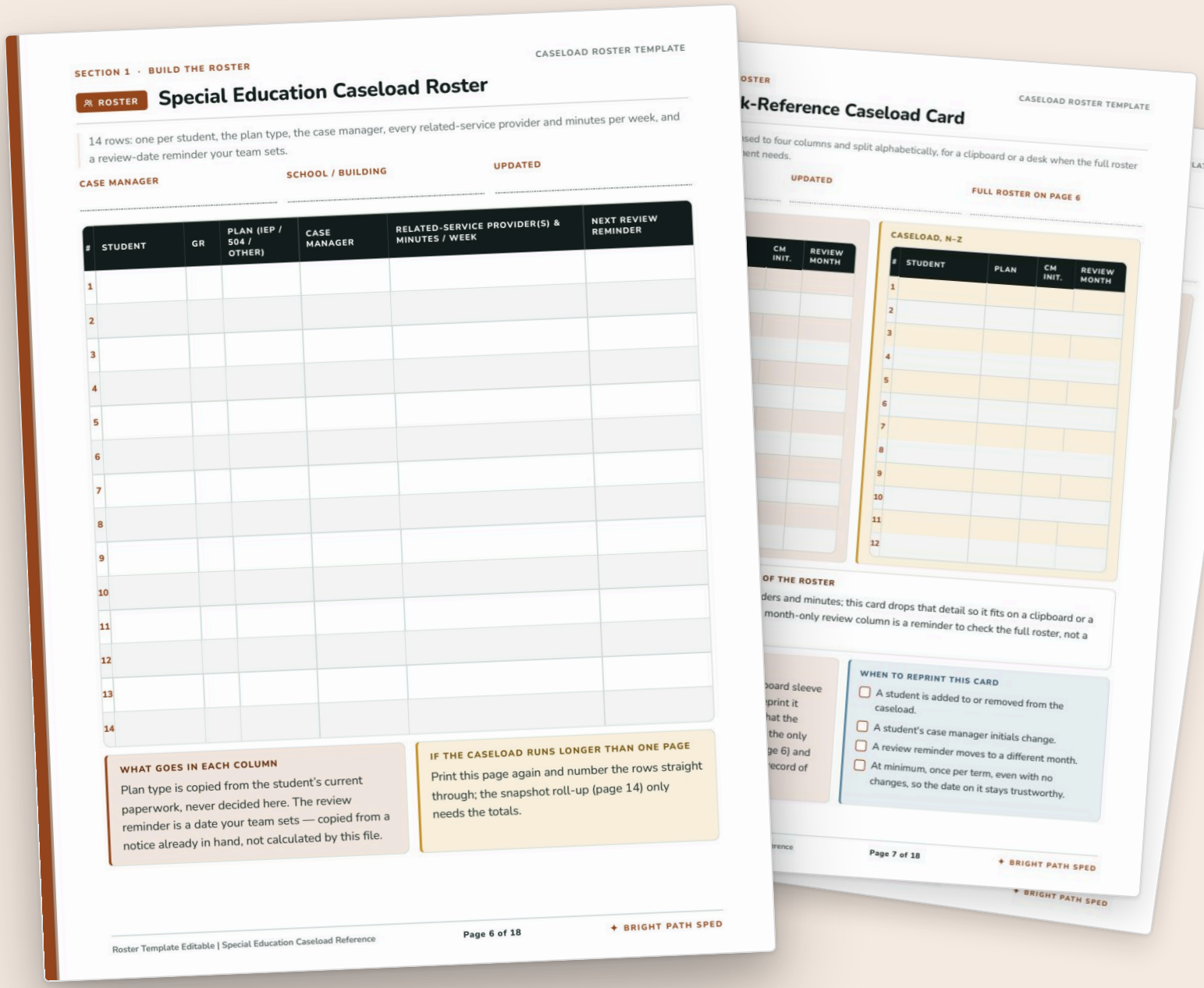
SPECIAL EDUCATION · CASE MANAGERS

EDITABLE

Caseload Roster Template



18 PAGES | ROSTER & PROVIDER DIRECTORY | REVIEW-DATE REMINDERS | FILLABLE PDF

BRIGHT PATH SPED

CONTENTS

What Is Inside, and Where

18 pages: three sections and a worked example. A static, updatable reference — who is on the caseload, their plan type, key contacts, and a review-date reminder.

Before you begin

PAGE 4



Start Here — Three Steps
START HERE
4

01 Build the Roster

PAGES 6–8



Special Education Caseload Roster
ROSTER
6



Quick-Reference Caseload Card
REFERENCE
7



Related-Service Provider Contact Directory
ROSTER
8

02 Keep It Legible & Current

PAGES 10–12



Quick-Reference Key and Legend
REFERENCE
10



New Student Onboarding Checklist
CHECKLIST
11



Transfer-Out Checklist
CHECKLIST
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03 Report It, Hand It Off

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Caseload Snapshot and Review-Date Roll-Up
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Caseload Update for a Team Member or Administrator
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Caseload Notes and Parking Lot
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Worked example

PAGE 17



A Caseload Roster, Filled In (Invented)
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WHAT THIS FILE IS NOT

Not a service-minute log and not a progress tracker: every table in this file is a snapshot you update by hand, never a running record of sessions or scores over time. No page here states a timeline, an eligibility rule, or a legal review deadline — every one of those is your district's own answer, with a blank line to write it on.

WHO THIS FILE IS FOR

A special education case manager with one caseload, the administrator who asks for a caseload count, and anyone who covers a caseload for a day, a week, or longer and needs to understand it without a phone call first.

☆ START HERE Start Here — Three Steps

Ninety seconds of reading. Build the roster once; everything after it is a page you update as the caseload changes.

1

Build the roster once

Fill in the caseload roster (page 6) and the provider directory (page 8); copy the quick-reference card (page 7) for a clipboard or a desk.

2

Keep it current

Read the key (page 10) once so every abbreviation is clear, then use the onboarding checklist (page 11) or the transfer-out checklist (page 12) the day a student joins or leaves.

3

Report it when asked

Run the snapshot roll-up (page 14) and send the caseload update (page 15) to a teammate or administrator; park anything open on the notes page (page 16).

WHAT THIS FILE IS

A fillable PDF: a full caseload roster, a condensed quick-reference card, a related-service provider directory, an abbreviation key, onboarding and transfer-out checklists, a snapshot roll-up, a communication page and a notes page — everything a case manager needs to keep a caseload organized, in one file. It works offline, with no account or subscription, and every page also prints blank for a pen.

WHAT THIS FILE IS NOT

Not a service-minute log and not a progress tracker — it does not collect data over time or calculate a number for a report. It does not define a plan type, decide who qualifies for one, or set when a review is legally due; every one of those stays a blank line for your district's own policy.

THE RULE EVERY PAGE IN THIS FILE FOLLOWS

Nothing here calculates a deadline or states an eligibility rule. Every review-date reminder is copied from paperwork already on file, never calculated by this file, and every blank for a district's own policy stays a blank.

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 roster page. Print page 6 again 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, AND WHERE THIS FILE LIVES

A filled-in page is a student record. Keep it in a secure place, follow your district's own records policy, and use first names or initials on any page that leaves the building.

ROSTER

Special Education Caseload Roster

14 rows: one per student, the plan type, the case manager, every related-service provider and minutes per week, and a review-date reminder your team sets.

CASE MANAGER _____ SCHOOL / BUILDING _____ UPDATED _____

#	STUDENT	GR	PLAN (IEP / 504 / OTHER)	CASE MANAGER	RELATED-SERVICE PROVIDER(S) & MINUTES / WEEK	NEXT REVIEW REMINDER
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

WHAT GOES IN EACH COLUMN

Plan type is copied from the student's current paperwork, never decided here. The review reminder is a date your team sets — copied from a notice already in hand, not calculated by this file.

IF THE CASELOAD RUNS LONGER THAN ONE PAGE

Print this page again and number the rows straight through; the snapshot roll-up (page 14) only needs the totals.

ROSTER

Related-Service Provider Contact Directory

15 rows for every related-service provider on the caseload, so a phone number or an email is never a second search away.

CASE MANAGER _____ SCHOOL / BUILDING _____ UPDATED _____

#	NAME	DISCIPLINE / ROLE	PHONE / EXT	EMAIL	STUDENT(S) SERVED (INITIALS)	BEST WAY TO REACH
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

WHO TO ADD FIRST

- [ ] Every related-service provider currently seeing a student on this caseload.
- [ ] The building administrator or special education coordinator for this caseload.
- [ ] The front office or records contact for anything that needs a signature.
- [ ] Anyone else a family or a teammate might need to reach about this caseload.

KEEP THIS PAGE WITH THE ROSTER

A provider directory a season out of date is slower to use than none. This page travels with the roster (page 6), not separately.

TRACKER

Caseload Snapshot and Review-Date Roll-Up

What the roster already says, turned into counts and a short list of who is coming up for a review — read off the roster, never a separate log.

CASE MANAGER

SNAPSHOT DATE

FULL ROSTER ON PAGE 6

CASELOAD SNAPSHOT, READ OFF THE ROSTER

STUDENTS ON CASELOAD

IEP

504

OTHER

PROVIDERS LISTED

STUDENTS WITH A REVIEW REMINDER THIS TERM

REVIEWED WITH

STUDENTS DUE FOR A REVIEW REMINDER SOON (10 ROWS)

#	STUDENT	PLAN	REVIEW REMINDER	WHO IS NOTIFIED
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

WHERE EVERY NUMBER ON THIS PAGE COMES FROM

Every count above is read off the roster (page 6) and the provider directory (page 8) as they stand today — a snapshot, not a log kept across visits to this page.

WHO THIS PAGE IS FOR

Whoever needs the caseload in numbers for a meeting or a hand-off: an administrator, a covering case manager, or the case manager's own file.

HOW OFTEN TO RUN THIS PAGE

Monthly is enough for most caseloads; run it again whenever a student is added or leaves (pages 11 and 12), or before any meeting where the numbers will be quoted out loud.

NOTES

Caseload Update for a Team Member or Administrator

Ready to send to a teammate or administrator: what the caseload looks like right now, what changed, and what still needs a decision.

PREPARED BY | DATE | SHARED WITH

CASELOAD SNAPSHOT

STUDENTS ON CASELOAD	IEP	504	OTHER

WHAT CHANGED SINCE THE LAST UPDATE

New students added, students who left, or a provider or review date that changed.

STUDENTS TO FLAG FOR THIS READER

#	STUDENT	WHY FLAGGED	NEXT STEP
1			
2			
3			
4			

QUESTIONS OR ITEMS NEEDING A DECISION

NEXT SCHEDULED REVIEW OR CHECK-IN WITH THIS READER

DATE | WHERE TO FIND THE DETAILS (PAGE NUMBER)

SIGNATURE | DATE

EXAMPLE

A Caseload Roster, Filled In (Invented)

SAMPLE · INVENTED STUDENT

Ms. Alvarez and every student below are invented, and so is every number on this page. Every count can be re-added from the roster rows above it.

CASELOAD ROSTER (PAGE 6) — MS. ALVAREZ, 6 STUDENTS, ALL INVENTED

#	STUDENT	GR	PLAN	CASE MANAGER	PROVIDER(S) & MINUTES / WEEK	REVIEW MONTH
1	A. Morales	3	IEP	Ms. Alvarez	Speech 30 min/wk	Oct (invented)
2	D. Chen	5	504	Ms. Alvarez	–	Nov (invented)
3	S. Patel	2	IEP	Ms. Alvarez	OT 60 min/wk · Speech 30 min/wk	Oct (invented)
4	W. Brooks	4	Other	Ms. Alvarez	Counseling 20 min/wk	Dec (invented)
5	R. Kim	1	IEP	Ms. Alvarez	PT 30 min/wk	Nov (invented)
6	E. Diaz	5	IEP	Ms. Alvarez	Speech 30 min/wk · OT 30 min/wk	Oct (invented)

PROVIDER DIRECTORY (PAGE 8), BUILT FROM THE ROSTER ABOVE

DISCIPLINE	STUDENTS SERVED
Speech-Language Pathologist	3 students (A. Morales, S. Patel, E. Diaz)
Occupational Therapist	2 students (S. Patel, E. Diaz)
Physical Therapist	1 student (R. Kim)
School Counselor	1 student (W. Brooks)

SNAPSHOT ROLL-UP (PAGE 14), OCTOBER (INVENTED)

STUDENTS ON CASELOAD	IEP	504	OTHER	DUE FOR REVIEW THIS MONTH
6	4	1	1	3

WHAT THE NUMBERS SAY, AND WHAT THEY DO NOT

Of Ms. Alvarez's 6 invented students, 4 carry an IEP, 1 a 504, and 1 another plan type named on its own roster row. 3 students (A. Morales, S. Patel, E. Diaz) are due for a review reminder in October (invented) — nothing on this page decides whether that review is legally due; the date is copied from paperwork already on file.

WHY THIS IS ENOUGH

Every number above came from a page already in this file: the roster gave the plan-type counts, the provider directory gave who serves whom, and the snapshot gave the October (invented) count. None of it came from memory, and a covering case manager could rebuild the same snapshot from the same two pages.