

What Is Inside, and Where

19 pages: three sections and a worked example. No page here states a timeline, an eligibility rule, or who may attend a meeting while the case manager is out — every one of those is your building's own call, with a blank line to write it on.

Before you begin

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**Start Here —
Three Steps**
START HERE

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01 Before You Go

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and Service
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Worked example

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EXAMPLE

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TWO DIFFERENT FLAGS, SIDE BY SIDE

The meeting-date flag calendar (page 10): a flag means a meeting might land on the schedule while the case manager is out.

The goal-progress handoff (page 11): a flag means that student's note is worth a second look by the covering team, nothing more.



START HERE

Start Here — Three Steps

Ninety seconds of reading. Set the pages up once, before the leave starts; the rest is ready for whoever covers the caseload.



1

Set up once

Fill in the binder cover and key dates (page 6), the caseload roster with service minutes (page 7), and the related-service provider directory (page 8) before the leave starts.

Print single-sided so the covering case manager can write directly on the pages.



2

Flag what matters while you're out

Mark any IEP meeting date that might fall during the leave (page 10) and write where each goal stands right now (page 11); send the family notification letter (page 12).



3

Hand it off, and plan the return

Send the handoff summary (page 14) and complete the roll-up (page 15) for whoever is covering the caseload; the phrase bank (page 16) writes both in observable language.

Open the debrief page (page 17) the day the case manager returns, before anything else on the desk.

WHAT THIS FILE IS

A fillable PDF: a caseload roster with service minutes per week, a provider directory, a meeting-date flag calendar, a goal-progress handoff, a family letter, a handoff summary, a roll-up and a return debrief — everything a case manager's caseload needs organized before an extended absence. It works offline, with no account or subscription, and every page also prints blank for a pen.

WHAT THIS FILE IS NOT

Not a leave-of-absence request or an HR form — the case manager's own leave paperwork and process stay with their district and their building, entirely separate from this binder. Not a legal records-transfer document, and it does not decide who may attend, lead, or sign for a meeting while the case manager is out.

THE RULE EVERY PAGE IN THIS FILE FOLLOWS

Nothing here calculates a deadline, states an eligibility rule, or decides who may run a meeting while the case manager is out. Every date on the calendar page is copied from a notice already in hand; every blank for a building's own policy stays a blank — this file never fills it in for you.

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 7 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, AND WHERE THIS BINDER LIVES

A filled-in page is a student record. Keep the completed binder 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**

Caseload Roster and Service Minutes

14 rows: one per student, the service minutes per week already on the plan, and who covers each service while the case manager is out. The whole-caseload, quick version of the handoff.

CASE MANAGER (ON LEAVE)

SCHOOL / BUILDING

COVERING CASE MANAGER

#	STUDENT	GR	PLAN (IEP / 504)	SERVICE(S) AND MINUTES / WEEK	COVERING PROVIDER (PAGE 8)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

ONE ROW, ONE GLANCE
Every service and minute count here is copied from a student’s current plan, never assumed. A blank “covering provider” cell is the first thing to chase down before the leave starts.

IF THE CASELOAD RUNS LONGER THAN ONE PAGE
Print this page twice and number the rows straight through; the roll-up (page 15) only needs the totals.

WHY MINUTES PER WEEK, NOT JUST THE SERVICE NAME

A service name alone does not tell a covering provider how much time to plan for. Copying the minutes-per-week figure straight from the current plan, in the same cell as the service, means the directory on the next page (page 8) can be built from this roster instead of a second search through every student’s file.

LOG

IEP Meeting-Date Flag Calendar

12 rows. A date copied from a notice already in hand, never calculated by this file, and a blank line for your building to say who attends in the case manager’s place.

BEFORE YOU MARK A DATE

This page does not decide who may attend, lead, or sign for a meeting while the case manager is out — that is the building’s own call, written on the line below each date. Every date here is copied from a notice already in hand; this file never calculates or assumes one.

CASE MANAGER (ON LEAVE)		LEAVE STARTS (EXPECTED)		LEAVE ENDS (EXPECTED)	
#	DATE (FROM THE NOTICE)	STUDENT	MEETING TYPE (YOUR OWN WORDS)	WHO ATTENDS IN MY PLACE (BUILDING'S OWN POLICY)	NOTES FOR WHEN I'M BACK
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

WHAT A BLANK ROW MEANS

A blank “who attends” cell is a question for the building to answer before the date arrives, not an answer this file guesses at.

PAIR IT WITH THE PROGRESS SUMMARY

For any student flagged here, the goal-progress handoff (page 11) is what whoever attends in the case manager’s place actually reads beforehand.

NOTES

Handoff to the Covering Case Manager

A ready-to-send summary for whoever is covering the caseload: what this handoff is built from, and the priority items for week one.

COVERING CASE MANAGER

LEAVE STARTS (EXPECTED)

LEAVE ENDS (EXPECTED)

DATE SENT

WHAT THIS HANDOFF IS BUILT FROM

ITEM	PAGE
Caseload roster and service minutes	7
Related-service provider directory	8
Meeting-date flag calendar	10
Goal-progress handoff summary	11

PRIORITY ITEMS FOR WEEK ONE

ROUTINES TO KEEP RUNNING WHILE I'M OUT

OPEN ITEMS AND WHO OWNS THEM

#	ITEM	OWNER	BY WHEN
1			
2			
3			
4			

OUTGOING CASE MANAGER SIGNATURE

DATE

TRACKER

Caseload Coverage Roll-Up

What the roster, the calendar and the progress summary actually produced, in counts, not a paragraph written from memory on the last day before the leave.

CASE MANAGER (ON LEAVE)

COVERING CASE MANAGER

LEAVE STARTS (EXPECTED)

LEAVE ENDS (EXPECTED)

HANDOFF STATUS, BY THE NUMBERS

WHERE THE CASELOAD STOOD AT HANDOFF	COUNT	NOTES FOR THE COVERING TEAM
Students with a complete roster row		
Students with a completed progress note		
Meetings flagged needing a building decision		

CASELOAD SNAPSHOT AT HANDOFF

STUDENTS ON CASELOAD	MEETINGS FLAGGED DURING THE LEAVE	PROGRESS SUMMARIES COMPLETED	PROVIDERS LISTED
FAMILY LETTERS SENT	STUDENTS STILL NEEDING A PROGRESS NOTE	OPEN ITEMS ON THE HANDOFF	REVIEWED WITH

REVIEWED WITH THE COVERING CASE MANAGER

DATE REVIEWED	COVERING CASE MANAGER INITIALS

A roll-up that shows what is still open, and why, is more useful to whoever is covering the caseload than one that looks finished and is not checked against anything.

WHERE EVERY NUMBER ON THIS PAGE COMES FROM

The snapshot is read off the roster (page 7), the meeting-date calendar (page 10), the goal-progress summary (page 11) and the provider directory (page 8). Nothing on this page is a number this file supplies for you.

WHO THIS PAGE IS FOR

The covering case manager first, since it is built to be read in a two-minute handoff conversation; the building administrator second, since a finished roll-up is the fastest way to see what is actually ready before the leave starts.

WORTH FLAGGING BEFORE THE LEAVE STARTS

EXAMPLE

A Leave, Handed Off and Handed Back — Filled In

SAMPLE · INVENTED STUDENT

Ms. Delgado, Mr. Whitfield and every student below are invented, and so is every number on this page. Every total can be re-added from the rows above it.

CASELOAD ROSTER (PAGE 7) — MS. DELGADO, 6 STUDENTS, ALL INVENTED

#	STUDENT	GR	PLAN	SERVICE(S) AND MINUTES / WEEK	FLAGGED?
1	A. Kim	3	IEP	Speech 30 min/wk · Resource 150 min/wk	Y
2	D. Osei	5	IEP	OT 60 min/wk · Resource 300 min/wk	N
3	S. Ibarra	2	504	Counseling 20 min/wk	N
4	W. Park	4	IEP	Resource 200 min/wk · Speech 30 min/wk	Y
5	R. Nolan	1	IEP	PT 30 min/wk · Resource 150 min/wk	N
6	E. Jafari	5	IEP	Resource 300 min/wk	Y

MEETING-DATE FLAG CALENDAR (PAGE 10) — THE 3 STUDENTS FLAGGED ABOVE

#	DATE	STUDENT	MEETING TYPE	WHO ATTENDS IN MY PLACE
1	Jan 22 (invented)	A. Kim	Annual review	Mr. Whitfield, per building policy
2	Feb 10 (invented)	W. Park	Progress review	Mr. Whitfield, per building policy
3	Mar 3 (invented)	E. Jafari	Re-evaluation review	Building team, per building policy

GOAL-PROGRESS HANDOFF (PAGE 11), THE SAME 3 STUDENTS

STUDENT	PROGRESS NOTE
A. Kim	Articulation goal: 70% accuracy in structured drill as of last data pull.
W. Park	Reading fluency goal: on track, two data points above the aim line.
E. Jafari	Math goal: one data point below the aim line; flagged for the covering team.

HANDOFF TO MR. WHITFIELD (PAGE 14)

Covering case manager: Mr. Whitfield **Leave starts:** Jan 5 (invented) **Leave ends:** Mar 20 (invented)

Built from: the 6-student roster, the provider directory, the flag calendar and the progress summary above.

Priority for week one: 3 students have a flagged meeting during the leave; their progress notes are already attached.

Open item: E. Jafari's math data point is below the aim line; see page 11.

WHY THIS IS ENOUGH

Every line above came from a page already in this binder. 3 of 6 students needed a flag; the rest needed only their roster row, and none of it came from memory.