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First 30 Days Case Manager Checklist

A Webinar for Special Education Administrators



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Special Education Leader
Founder / CEO at Project IDEA

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2pm ET

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2023-2024 Webinar Series

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About the Sponsor

Our Mission: We are passionate about helping special education teams streamline data collection and reporting through innovative software and support.

Brolly Software: Our software helps teachers track & monitor IEP services and goals with ease, and provides powerful analytics and reporting for better data transparency and improved student outcomes.

Brolly is Endorsed by CASE



CASE

COUNCIL OF ADMINISTRATORS
OF SPECIAL EDUCATION

LEADERSHIP • VISION • EXCELLENCE



About our June webinar partner: Project-IDEA

Project IDEA is a boutique consulting firm that provides customized solutions to bring excellence in Special Education to schools, districts, and families. They become part of your organization and culture while also providing excellence and expertise from multiple external partners to address every area of need in Special Education and beyond.

Webinar Agenda

Thanks for being here. Here is a brief overview of our next hour together.

01


First 30 Days: Case Manager Checklist

02

Q&A and Helpful Resources

03

A brief word from your sponsors!



Use Zoom Chat
to submit your
questions as
we go!



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Learning Targets

First 30 Days: Case Manager
Checklist

#1: Discover tasks your staff should be doing before the start of school and the first 30 days

#2: Consider guiding questions to support beginning of year conversation and collaboration with your team

#3: Review systems that make case management a breeze and allows you track compliance before IEPs are overdue

About the Speaker



Ingrid Wulczyn

Ingrid has spent over 15 years in special education working as a teacher and administrator in both network and central district office settings. Over the past three years, she has built an organization that has the expertise required to make real change within schools and also has explored and created technological solutions to the most practical problems that our teachers are facing. Ingrid and her family live in Denver, Colorado.



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First 30 Days Case Manager Checklist

For Special Education
Administrators



The First 30 Days: An Effective, Efficient Start to the Year

 **managed.**
BY PROJECT IDEA

Framing



Teachers



Administrators



LEA

Special education
teacher turnover is 2.5x
greater than general
education teachers –
due largely to attrition



Special education teachers
regularly report feeling
overwhelmed; these teachers
report spending *only 1/3rd of
their time serving students*



Administrators are *juggling
competing demands*, and often do
not have the training to support
their teachers, despite being a risk
for legal compliance issues

General Guidance on the *First 30 Days* Checklist



Broken down



Getting it in writing



Critical information,
planning and norming



Prioritization



Determining
and
documenting
**who is
responsible**
is a critical,
proactive step



Prior to Students Arriving



Basics

- Licensing
- Access to IEP systems
- Caseload Information
- Provider Information
- Other Important Stakeholders

Prior to Students Arriving



Review of Records

- Most recent Evaluation and Eligibility Determination
- IEP
- BIP
- Progress Reports



Prior to Students Arriving

Tentative IEP and Evaluation Event Calendar

- State / District Requirements
- Team Alignment and Collaboration
- Document and Share

Prior to Students Arriving



Schedules

- Identify Student Schedules
- Create Teacher and Paraprofessional Schedules accordingly

Prior to Students Arriving



Gen Ed Teacher Support

- IEP Snapshots
- Accommodations and Modifications
- BIPs

The First Week



Establishing Rapport

- Introductions
- Get to know you activities
- Ongoing communication plan

The First Week



Data Collection & Progress Monitoring

- Schedule creation
- Baseline data

The First Week



Service Logs

- Format
- Person Responsible
- Frequency
- Confidentiality

The First Week



Indirect & Consultation Services

- Aligning Availability
- Collaborative goals



End of the First 30 Days

SpEd Department Organization

- Communication system
- Establishing and identifying leadership
- Logistics and planning



End of the First 30 Days

Assessment Planning

- School-wide
- Administering accommodations
- Timeline and results
- MTSS referrals



End of the First 30 Days

Professional Learning

- Identifying and accessing opportunities
- Pay schedule



End of the First 30 Days

Review District Policies

- Development of IEPs and Evaluations
- Goal writing
- High needs cases

How managed. works

managed. takes work off of teachers' plates. *We believe teachers should not be spending their time on administrative tasks that don't directly support students.*

With **managed.**, teachers no longer have to worry about the minutiae of case management and IEP compliance.

This Week's Tasks



Person

Filter / 4

1003 - Sophia Thompson *Annual Review IEP*

<input type="checkbox"/>	Task		*Student ID - Full Na...	Status	
<input type="checkbox"/>	Remind School Team of Upc...		1003 - Sophia Thompson	Done	
<input type="checkbox"/>	Hold the Meeting		1003 - Sophia Thompson	Working on it	
<input type="checkbox"/>	+ Add task				

1004 - William Harris *Annual Review IEP*

<input type="checkbox"/>	Task		*Student ID - Full Na...	Status	
<input type="checkbox"/>	Finalize the IEP		1004 - William Harris	Done	
<input type="checkbox"/>	+ Add task				

1005 - Salyssa Alers

<input type="checkbox"/>	Task		*Student ID - Full Na...	Status	
<input type="checkbox"/>					

Making Workloads Manageable

FEATURES	TRADITIONAL IEP SYSTEMS	MANAGED.
Shows Caseload	✓	✓
Flags Upcoming and Overdue Events	✓	✓
Schedules Meetings and Interpreters	✗	✓
Sends Guardians Drafts and Finalized Documents, Surveys, Meeting Notice, & Feedback Opportunities	✗	✓
Facilitates Team Member Communication and Collaboration	✗	✓
Reminders (to reduce time spent on rescheduling & increase time on data collection and analysis)	✗	✓

The reality of special education caseload management can **feel overwhelming** to even the most passionate and hard-working teachers

Each annual IEP meeting requires 25+ different tasks

Confirm meeting with team

Schedule meeting

Remind team to complete drafted IEP

Send drafted IEP to guardian(s)

Send calendar invite

Schedule interpretation (if applicable)

Each annual IEP meeting requires 25+ different tasks

Remind team of upcoming meeting

Remind team drafted IEP sent home tomorrow

Create & send notice of meeting & procedural safeguards to guardian(s)

Remind team of upcoming meeting

Confirm survey responses

Draft IEP

Revise drafted IEP

Send revised drafted IEP to guardian(s)

Remind team to revise drafted IEP

Send input surveys to guardian(s) & general education teachers

Confirm team attendance

Remind team to convene for pre-meeting

Hold meeting

Finalize IEP

Reminder of finalized IEP

Remind team to start draft of IEP

Convene for pre-meeting

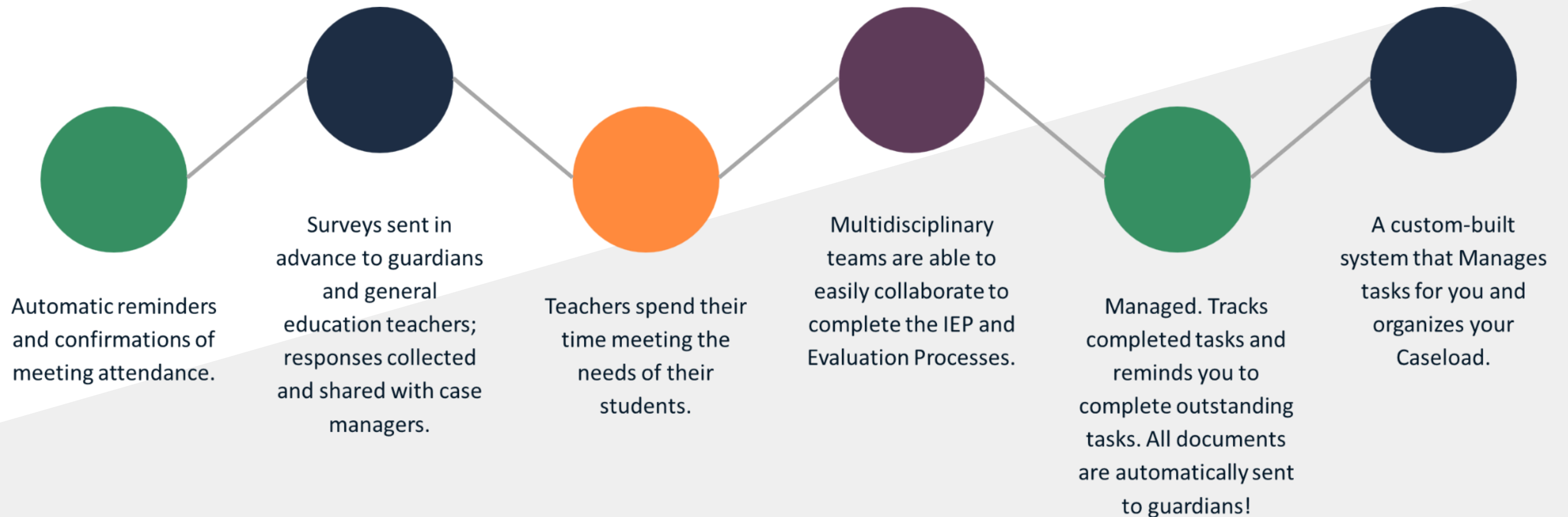
Remind team revised IEP sent home tomorrow

Send finalized IEP & follow-up survey to guardian(s)



Caseload – managed.

Through powerful automation and support, the 25+ tasks associated with an annual IEP are streamlined to only the 6 most empowering tasks.



Learn more about how  managed.
can help you address **recruitment,
retention and reducing teacher
workload**



Ingrid Wulczyn - [schedule a call now](#)

Resources

1. [Sample First 30 Days Case Manager Checklist](#)
2. [Sample Independent Education Evaluation \(IEE\) Standard Operating Procedure](#)

Webinar Resource Page

First 30 Days Case Manager Checklist

Presenter: Ingrid Wulczyn

The first 30 days of school is an incredibly important time for special educators to set themselves up for a great start to the school year. It's also a busy time of year and newer teachers and providers may not know the kinds of tasks and planning they should be thinking about. In this session, Ingrid Wulczyn will share guiding questions and tasks that will help support your special education program for the new school year.

In this session you'll learn:

- Specific tasks in a template resource that all special education teachers should be doing before the start of the school year and the first 30 days
- Guiding questions to support beginning of year conversation and collaboration with your team
- Systems that make case management a breeze and allows you track compliance before IEPs are overdue

In this session, you will learn:

- How to identify inefficient workflows within your department
- Effective strategies to identify tech platforms that help address and improve ineffective workflows
- Best practices for using technology to improve efficiency
- Easy to identify features of meaningful and efficient technology

Webinar Recording

Session Materials

Certificate of Participation



What's Up Next?



Join us again starting in August for a 3 webinar series with **Dr. Howie Knoff** - President of Project ACHIEVE, internationally-known innovator and hands-on practitioner in the areas of:

- School Improvement and Strategic Planning
- Social-Emotional Learning and multi-tiered Positive Behavioral Support Systems
- Social Skills Training
- Strategic Interventions for Challenging Students.





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Q&A

Send us a message at learn@brollyed.com
if you have any questions about this
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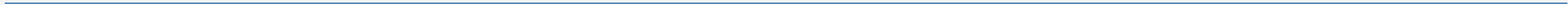


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Abby Fereday

President



Stacy Hunt

Customer Success



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Thank You!

from the Brolly Partnerships Team